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ABSTRACT

This manual is designed to increase the number of volunteer programs in alcohol service agencies and to upgrade existing programs which are being coordinated by helping professionals in alcohol service agencies. The goals of this training program include assisting participants in: (1) being aware of the pros and cons of having volunteer programs; (2) being familiar with several principles in developing and maintaining effective volunteer programs; (3) understanding the systematic sequence for exploring, designing, and implementing pilot volunteer programs; and (4) analyzing the tasks necessary for program implementation in the back-home setting. The methodology for presenting these materials includes the use of small and large group discussions, problem-solving activities, and individual pencil/paper task assignments. Additionally, facilitator instructions and evaluation instruments are provided. (Author/HLM)

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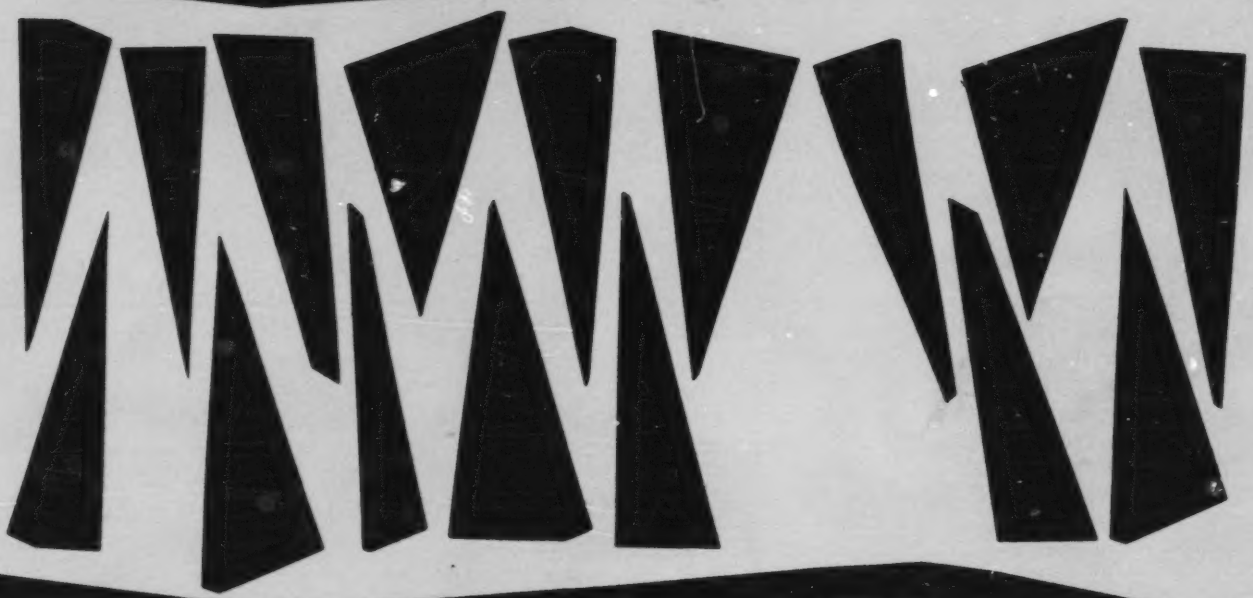
National Institute on Alcohol Abuse and Alcoholism

Trainer Manual



using volunteers in your agency

GG0139924

U. S. Department of Health, Education, and Welfare • Public Health Service • Alcohol, Drug Abuse, and Mental Health Administration

Program Overview

Purpose: To increase the number of volunteer programs in alcohol service agencies and to upgrade existing programs

Goals: To assist participants to:

- be aware of the pros and cons of having volunteer programs in alcohol service agencies
- be familiar with eight primary principles in developing and maintaining effective volunteer programs
- be familiar with the step-by-step sequence for exploring, designing, and implementing pilot volunteer programs
- analyze the necessary tasks to undertake upon return to their own agencies and to develop plans for accomplishing those tasks

Course Materials:

17-24-845-1

- *Volunteer Program Development Guide* (participants' take-home book, also used as a primary resource for trainer preparation)
- *Trainer Manual* (includes evaluation instruments and masters for participant handouts and overhead transparencies)

17-24-808-7

- Trainer's *Session Outline Cards*
- Two sound filmstrips (filmstrip and audio cassette)

Audience: This training program is designed for the person in alcohol service agencies who is or will be the volunteer coordinator for that agency. A secondary audience is the staff person in an agency who is responsible for looking at the feasibility of establishing a volunteer program for that agency. Spinoff uses of part of the course materials include orientation of agency boards of directors and agency staff to the principles of volunteer programs.

Trainer Requirements: Both training skills and firsthand experience or knowledge in planning and management of volunteer programs are needed to conduct this program. The training skills required include expertise in setting up and managing training events, skill in managing group dynamics, and minimal skill in operating audiovisual equipment. Refresher material on training skills is included in the *Trainer's Manual.* Expertise in the management and planning of volunteer programs is important in leading group discussions. If the trainer lacks this background, such an individual with appropriate experience may be invited to act as a resource person during the training program. This resource person should be completely familiar with the approach of the training package so that the resource input will fully complement the content of the package.

Content:

Session 1: Pros and Cons of a Volunteer Program
Session 2: Principles of an Effective Volunteer Program
Session 3: Planning a Pilot Volunteer Program
Session 4: Getting Started with Your Own Agency Program

Methodology: Small and large group discussions and problem solving, sound filmstrip presentations, individual pencil-and-paper task assignments.

Time Requirements: Eight hours total training time; sessions range from 1½ to 2½ hours duration.

Trainer Manual

Using Volunteers in your Agency

developed by
National Center for Alcohol Education

U.S. Department of Health, Education, and Welfare
Public Health Service
Alcohol, Drug Abuse, and Mental Health Administration

National Institute on Alcohol Abuse and Alcoholism
5600 Fishers Lane
Rockville, Maryland 20857

1978

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The Volunteer Program Development Guide and its accompanying 8-hour training program, "Using Volunteers in Your Agency: Planning, Implementing, and Maintaining a Volunteer Program," is the product of a nationwide model program development effort of local, regional, and national organizations. The guide and the training program were developed by the National Center for Alcohol Education in cooperation with the Area Alcohol Education and Training Programs:

Eastern Area Alcohol Education and Training Program
Bloomfield, Conn.

Midwest Area Alcohol Education and Training Program
Chicago, Ill.

Southern Area Alcohol Education and Training Program
Atlanta, Ga.

Western Area Alcohol Education and Training Program
Reno, Nev.

and the following local agencies:

Alcohol Council of Greater New Haven
New Haven, Conn.

Community Addictive Treatment, Inc.
Topeka, Kans.

Alcoholism Association of Alabama
Montgomery, Ala.

Alcoholism Council of California
Los Angeles, Calif.

Alcoholism Unit, Topeka State Hospital
Topeka, Kans.

National Center for Alcohol Education
National Institute on Alcohol Abuse and Alcoholism

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Preface

How and Why "Using Volunteers in Your Agency" Was Developed

This training model was developed by the National Center for Alcohol Education (NCAE) in cooperation with the Area Alcohol Education and Training Programs (AAETP) to meet the needs of alcoholism service workers as identified in needs assessment data gathered by the AAETPs. The need for training assistance in planning, designing, and implementing volunteer programs in local agencies was expressed in all four AAETP areas, making the topic appropriate for the development of a national training model.

NCAE staff wrote the resource document, the *Volunteer Program Development Guide*, and designed the training activities in consultation with the four AAETPs and with alcoholism field personnel who are responsible for training in their own agencies. This team approach to model development and field demonstration of the training model brought local experience and perspectives to the project.

In addition, NCAE conducted a literature search and contacted numerous agencies with successful volunteer programs, including the American Red Cross and the National Center for Voluntary Action. The materials have been reviewed by content specialists and consumer-users.

Pilot field demonstrations were held in three of the four AAETP areas, involving trainers with a wide range of professional education and experience in different training settings. Field demonstrations were formally evaluated to assess their instructional adequacy and their relevance to participants' needs, and to obtain information on which to base further refinement of the training materials.

The model has been revised since the pilot demonstrations to make the trainer's task as easy as possible. Flexibility has been built into the model so that it can be adapted to meet individual needs and circumstances.

Introduction

"Using Volunteers in Your Agency: Planning, Implementing, and Maintaining a Volunteer Program" is a training package designed for people interested in beginning a volunteer program in an alcohol service agency or in improving an existing program. It is an 8-hour, four-session workshop. Workshop materials include:

- the *Trainer Manual* (including masters for preparing participant handouts and transparencies for use with an overhead projector),
- *Session Outline Cards* (for trainer use in delivering the workshop),
- the *Volunteer Program Development Guide* (for the trainee*), and
- two sound filmstrips (filmstrips and audio cassettes).

The *Trainer Manual* provides information about preparing for and managing the workshop. The *Session Outline Cards* are a session-by-session guide for trainer use during the workshop. The *Volunteer Program Development Guide* is the participant's text for use both during the workshop and as a posttraining reference. The two sound filmstrips cover the principles of an effective volunteer program and the steps involved in planning, designing, and implementing such a program. In addition to their planned use in sessions 2 and 3, the filmstrips can be used independently for orienting agency boards of directors and/or agency staff.

*The terms "trainee" and "participant" are used interchangeably in this package.

Who can benefit from this training?

- Individuals responsible for planning, implementing, and maintaining a volunteer program in an alcohol service agency are the primary target audience. The workshop should benefit both those who are planning such a program and those who want to improve an existing program.
- Agency boards of directors and agency staff may also benefit from adapted portions of the workshop. Boards of directors often need to be convinced that volunteer programs can be productive. Staff members need to be reassured that their roles are not threatened and that adequate forethought is going into the volunteer program. For this purpose, trainees may be interested in borrowing the sound filmstrips from the trainer and using them to initiate discussions in their own agencies.

Who can best conduct the workshop?

Implementing this workshop requires both training skills (i.e., ability to organize and manage a training program, lead group discussions, present audiovisual

materials, and facilitate small group work) and a knowledge of how volunteer programs operate. A trainer or training team combining these areas of expertise is needed to conduct this workshop most effectively.

- A volunteer program director or coordinator without extensive training experience may deliver the workshop successfully with the aid of the fully detailed information about conducting this workshop and the trainer refresher material provided in section II and appendixes A and B of this manual.

- An experienced trainer with no special knowledge of volunteer programs may conduct the workshop with the assistance of a person experienced with volunteer programs acting as cotrainer or resource person.

What kind of preparation is necessary to conduct the workshop?

Implicit in the use of this training package is a willingness to work with materials developed by others. This, in turn, requires a willingness to spend adequate time to master the training package materials and methods.

- Proper trainer preparation will require studying this manual and the *Volunteer Program Development Guide*, previewing all of the training materials, and conducting at least one rehearsal or dry run before actually presenting the workshop. It would also be very useful to read *Volunteer Services: A Manual for Alcoholism Program Directors**, also produced by NCAE, for further background information about volunteer use in the alcohol service field. This training package presents a generic planning process; *Volunteer Services* discusses issues such as specific uses of volunteers in an alcohol service agency, working with Alcoholics Anonymous (A.A.), and using volunteer counselors.

- In addition to preparing to present the workshop, the trainer must be able to assume or assign the role of program manager to carry out managerial and logistical tasks involved in conducting the workshop. (See appendix B for review of workshop management.)

- Participant handouts and overhead transparencies must be reproduced from masters in appendixes C and D.

How many participants should be recruited?

The workshop is designed for 12 to 20 trainees. Usually, 75 to 100 invitations are required to obtain this number of participants.

Where can the workshop be conducted?

The training site should be comfortable and attractive and must be large enough to accommodate 20 participants for

- large group discussion,
- small group work, and
- audiovisual presentations.

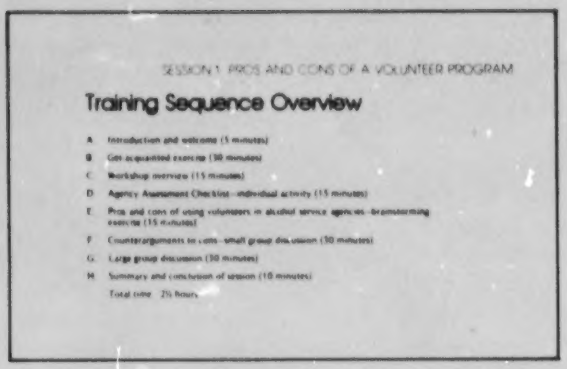
(See appendix B for further discussion of training site selection.)

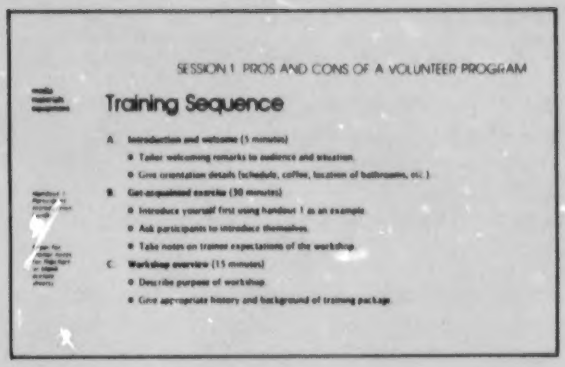
Trainer Manual. This document, the *Trainer Manual*, is designed to help the trainer prepare for conducting the workshop. The remainder of this section describes the workshop materials and suggests a preparation procedure. Section II describes in detail the contents and activities of each training session. Reduced copies of the handouts and transparencies to be used in the sessions and the scripts and accompanying visuals of the filmstrips used in sessions 2 and 3 are included in the text of section II, as well as background information about why each activity was chosen and any special points of emphasis or cautions involved in presenting the material. Appendix A provides refresher material on the trainer role and a review of generic information about conducting an adult training program. Appendix B discusses workshop management and logistics and includes sample recruiting materials. Appendix C contains masters of the handouts to be reproduced and distributed to participants. Appendix D contains masters of the overhead transparencies to be used in each session. Appendix E contains a training evaluation instrument for optional use.

Session Outline Cards. The *Session Outline Cards* are cue cards for trainer use during the workshop. This format allows the trainer to move around the room rather than becoming a captive lecturer behind a desk or podium. The cards are merely an outline; space is provided for notes and key questions the trainer will prepare for his or her own use in conducting the workshop.

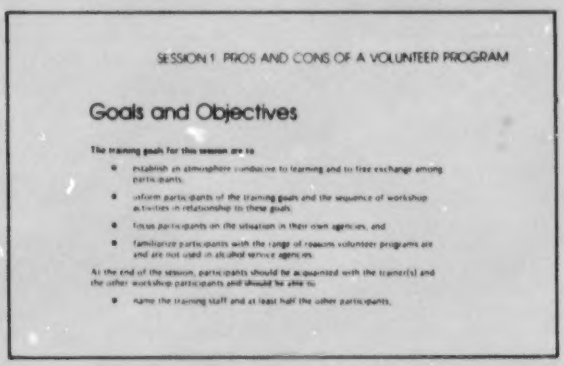
The cards follow the same sequence and format for each session. The first cards provide an overview of the training sequence, including suggested time periods for each activity.

*This book can be ordered from the Superintendent of Documents, U.S. Government Printing Office, Washington, D.C. 20402. Request Stock No. 017-024-00547. The price is $1.35.

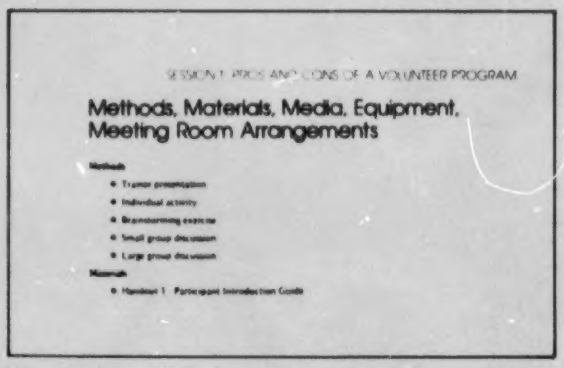

SESSION 1 PROS AND CONS OF A VOLUNTEER PROGRAM
Training Sequence Overview
A Introduction and welcome (5 minutes)
B Get-acquainted exercise (30 minutes)
C Workshop overview (15 minutes)
D Agency Assessment Checklist—individual activity (15 minutes)
E Pros and cons of using volunteers in alcohol service agencies—brainstorming exercise (15 minutes)
F Counterarguments to cons—small group discussion (30 minutes)
G Large group discussion (30 minutes)
H Summary and conclusion of session (10 minutes)
Total time 2½ hours


SESSION 1 PROS AND CONS OF A VOLUNTEER PROGRAM
Training Sequence
A Introduction and welcome (5 minutes)
• Tailor welcoming remarks to audience and situation.
• Give orientation details (schedule, coffee, location of bathrooms, etc.).
B Get-acquainted exercise (30 minutes)
• Introduce yourself first using handout 1 as an example.
• Ask participants to introduce themselves.
• Take notes on trainer expectations of the workshop.
C Workshop overview (15 minutes)
• Describe purpose of workshop.
• Give appropriate history and background of training package.

The next cards specify training goals and participant objectives.


SESSION 1 PROS AND CONS OF A VOLUNTEER PROGRAM
Goals and Objectives
The training goals for this session are to
• establish an atmosphere conducive to learning and to free exchange among participants;
• inform participants of the training goals and the sequence of workshop activities in relationship to these goals;
• focus participants on the situation in their own agencies; and
• familiarize participants with the range of reasons volunteer programs are and are not used in alcohol service agencies.
At the end of the session, participants should be acquainted with the trainer(s) and the other workshop participants and should be able to:
• name the training staff and at least half the other participants.

Subsequent cards summarize the media, materials, equipment, training methods, and suggested meeting room arrangements for the session.


SESSION 1 PROS AND CONS OF A VOLUNTEER PROGRAM
Methods, Materials, Media, Equipment, Meeting Room Arrangements
Methods
• Trainer presentation
• Individual activity
• Brainstorming exercise
• Small group discussion
• Large group discussion
Materials
• Handout 1 Participant Introduction Guide

The remaining cards specify the training activities. Media, materials, and equipment are noted in the left margins of these cards as they occur in the training sequence.

Participant Handbook. The *Volunteer Program Development Guide* is a reference for both trainer and participants during the workshop and an on-the-job guide for developing or improving a volunteer program. Section I introduces eight basic principles for an effective volunteer program.

Sections II, III, and IV discuss exploration, design, and implementation phases in establishing a volunteer program in terms of the operational steps involved in carrying out each development phase. Section V contains a bibliography and describes other resources available to program planners. Sample documents related to recruiting, interviewing, and volunteer orientation and training are also provided.

Transparencies. Masters for preparing transparencies for use with an overhead projector are to be found in appendix D. Their use allows the trainer to present information to the whole group in an easy and efficient manner. Having information ready on a "premade chalkboard" allows continuity in the presentation, focuses attention on significant material, and provides built-in emphasis on the material thus presented. Reproduction of transparencies and operation of the overhead projector are described on pages 53 and 54. If an overhead projector cannot be used, this material can be put on a flipchart or chalkboard.

Sound filmstrips. The sound filmstrips are used in sessions 2 and 3 to present the eight principles of an effective volunteer program and the steps in planning, implementing, and maintaining a volunteer program. Use of the filmstrips in the workshop is described in section II. Operation of the filmstrip projector is discussed on page 55.

Participant handouts. Masters for the participant handouts are to be found in appendix C of the manual. Copies for each participant must be reproduced before the workshop. Their use in the sessions is discussed in section II.

What is the suggested procedure for preparing to conduct the workshop?

Management and logistics. The first considerations in preparing for the workshop are those of organization: choosing a time and place, recruiting and selecting participants, and obtaining materials and equipment. See appendix B for suggestions about planning and carrying out these management tasks.

Mastery of content and session sequence. In preparing to conduct the workshop, it is suggested that the trainer begin by reading through section II, in conjunction with the *Session Outline Cards*, to become familiar with the total contents and sequence of the sessions and the workshop materials (handouts, transparencies, and filmstrips).

Background and refresher materials. Next, the trainer may want to go over section II again, this time reading the relevant sections of the *Volunteer Program Development Guide* and the refresher notes in appendix A of the manual as they are referred to in the text.

Session notes. The next step is to review the *Session Outline Cards*, this time planning specifically how each session will be conducted and making notes on the cue cards about introductory remarks and key questions to emphasize particular points, stimulate discussion, summarize sessions, and so on. If there is to be a cotrainer or if a resource person will be present during the sessions, it will be necessary to plan together how to cooperate in conducting the sessions.

Planning media, materials, and equipment. At this stage, the trainer will want to preview the filmstrips, prepare the transparencies, and plan the reproduction and distribution of handouts.

Final preparation. A "dry run" through all the sessions, preferably with another person acting as participant-audience, provides an excellent final step in preparation. This exercise will give a feel for the flow and structure of the workshop and for using the *Session Outline Cards*. If at all possible, use of the transparencies and filmstrips should be included in this rehearsal. If the necessary equipment is not available, the trainer should at least go through the motions to become familiar with how and where these media are used in the sessions and with coordinating the visual and verbal presentations.

How much time a trainer will need to spend in preparation will be an individual matter, but he or she should be sure to spend as much time as it takes to feel completely in control of the material.

Conducting the Workshop: Session-by-Session Guide

Overview

This section of the manual gives a session-by-session guide describing each training activity, why it was chosen, and how it is carried out. Reduced copies of the handouts, transparencies, and the visuals and scripts of the filmstrips are included in the text for easy reference. *This section should be read with the Session Outline Cards in hand.*

The purpose of the workshop is to familiarize participants with issues relating to the use of volunteers and the principles and planning procedures involved in establishing an effective volunteer program. Session 1 includes an exercise to focus participants on their own agencies and discussion of pros and cons of using volunteers. Session 2 presents the principles of an effective volunteer program by means of a sound filmstrip; the group discusses these principles in relation to problems identified in session 1. In session 3, another sound filmstrip is used to present a program planning procedure. In session 4, participants develop and discuss plans of action to be initiated on return to their agencies.

Registration procedure

It is suggested that participants be asked to arrive about ½ hour ahead of the planned start of the workshop. This will allow time to greet and register each participant and to distribute workshop materials.

Registration packets can be prepared ahead for distribution to participants on arrival. This will avoid interruptions to distribute materials during the workshop. Packets should include:

- Name tags
- All session handouts
- A copy of the *Volunteer Program Development Guide*
- Pencil or pen
- List of participants' names and addresses

The participant roster will aid in the getting-acquainted process and will help participants to keep in touch with each other after the workshop. There will probably be last-minute changes in the attendance list, so the roster should be compiled as late as possible. Final corrections can be made during the getting-acquainted exercise in session 1.

Session 1: Pros and Cons of a Volunteer Program — 2½ Hours

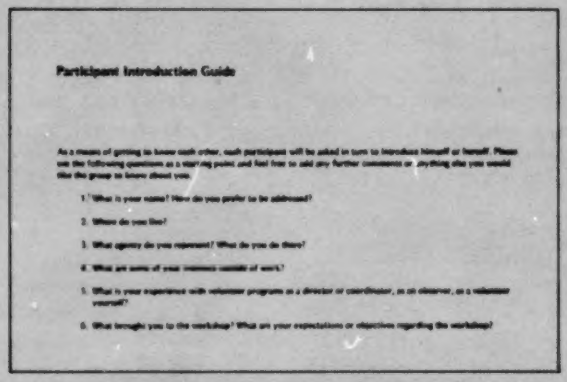
The first five session outline cards outline the overall training sequence; session goals and objectives; and summarize training methods, materials, media, equipment, and meeting room arrangements to be used in the session.

The overall goals of this session are to establish an atmosphere conducive to learning and to open exchange among participants, to orient participants to what is to come in the workshop, and to involve participants in an immediate way in thinking about the advantages and disadvantages of using volunteers. Each activity is directed toward at least one of these goals.

Introduction and Get-Acquainted Exercise (A and B)

The introduction and welcoming remarks (A) set the stage and answer "creature comfort" questions such as "When's lunch?"

In the get-acquainted exercise (B), participants are invited to introduce themselves, using handout 1 to help focus their remarks.



Participant Introduction Guide

As a means of getting to know each other, each participant will be asked in turn to introduce himself or herself. Please use the following questions as a starting point and feel free to add any further comments or anything else you would like the group to know about you.

1. What is your name? How do you prefer to be addressed?
2. Where do you live?
3. What agency do you represent? What do you do there?
4. What are some of your interests outside of work?
5. What is your experience with volunteer programs as a director or coordinator, as an observer, as a volunteer yourself?
6. What brought you to the workshop? What are your expectations or objectives regarding the workshop?

This exercise is provided to establish a basis of exchange among participants and to cue the trainer to participant expectations about the workshop. The exercise is successful to the degree that participants are encouraged to open up and disclose themselves to the group. It is therefore important that the trainer set the tone by going first and showing a willingness to disclose information about himself or herself, perhaps inviting participant questions.

This activity should not be rushed through. As with all of the time specifications throughout the workshop, 30 minutes is a *suggested* time period. Time spent now in allowing participants to get to know each other pays off later in the effectiveness of group work. It is appropriate for the trainer to take time to comment on participants' remarks and to encourage the other participants to do so as well, especially if the exercise threatens to become too stilted or formalized.

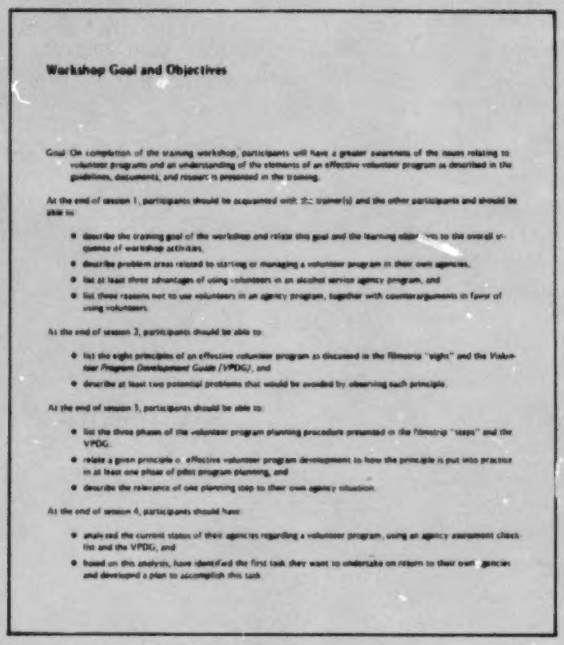
Workshop Overview (C)

As outlined, the workshop overview (C) includes a description of the purpose of the workshop, the history and background of the training package, and an introduction to the trainee's text, the *Volunteer Program Development Guide* (VPDG).

This overview should orient participants to the training plan (transparencies A and B), familiarize them with the text, and allow the trainer to discuss participant expectations.

Information about the history and background of the training package is found in the preface to this manual. The trainer should add notes about why he or she and/or the sponsoring agency have undertaken to conduct the workshop.

Participants are then referred to handout 2, workshop goal and objectives. This handout will be referred to again at the beginning of each session to help participants keep track of where they are in the training sequence.



Workshop Goal and Objectives

Goal: On completion of the training workshop, participants will have a greater awareness of the issues relating to volunteer programs and an understanding of the elements of an effective volunteer program as described in the guidelines, documents, and research presented in the training.

At the end of session 1, participants should be acquainted with the trainer(s) and the other participants and should be able to:

- describe the training goal of the workshop and relate this goal and the learning objectives to the overall structure of workshop activities,
- describe problem areas related to starting or managing a volunteer program in their own agencies,
- list at least three advantages of using volunteers in an alcohol service agency program, and
- list three reasons not to use volunteers in an agency program, together with counterarguments in favor of using volunteers.

At the end of session 2, participants should be able to:

- list the eight principles of an effective volunteer program as discussed in the filmstrip "eight" and the *Volunteer Program Development Guide (VPDG)*, and
- describe at least two potential problems that would be avoided by observing each principle.

At the end of session 3, participants should be able to:

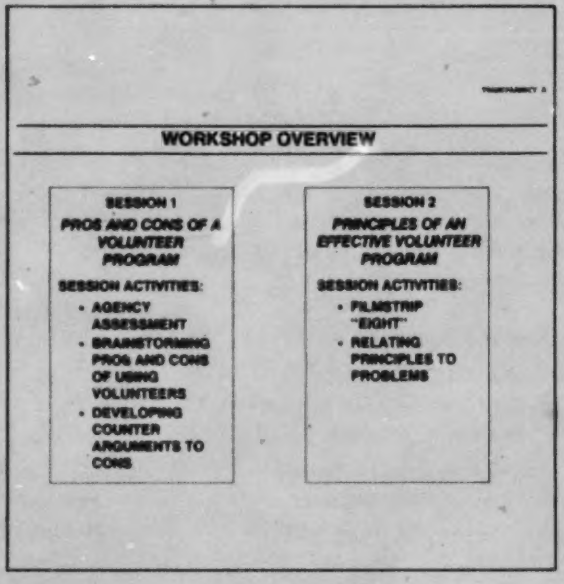
- list the three phases of the volunteer program planning procedure presented in the filmstrip "steps" and the VPDG,
- relate a given principle of effective volunteer program development to how the principle is put into practice in at least one phase of pilot program planning, and
- describe the relevance of one planning step to their own agency situation.

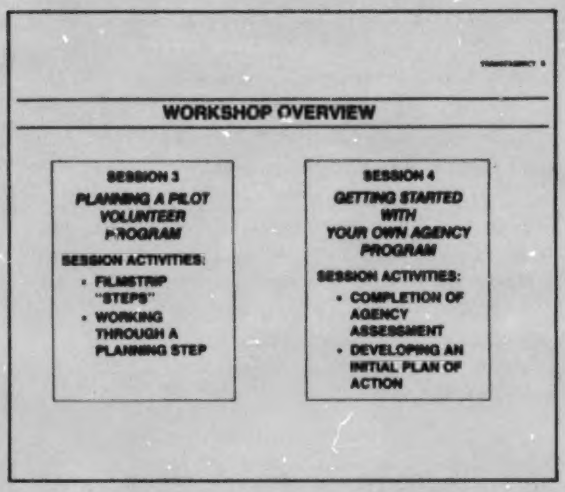
At the end of session 4, participants should have:

- analyzed the current status of their agencies regarding a volunteer program, using an agency assessment checklist and the VPDG, and
- based on this analysis, have identified the first task they want to undertake on return to their own agencies and developed a plan to accomplish this task.

When the participants have read through handout 2, display transparencies A and B, the Workshop Overview and Instructions for Small Group Work. Describe the activities for each session and how they relate to the goal and objectives and to the participant expectations elicited in the get-acquainted exercise.

For example, participants who are concerned about persuading their boards of directors of the advantages of a volunteer program will be helped by the discussion of volunteer program pros and cons in session 1. Needs of those who are ready to begin planning and designing an effective program will be met in session 3.


WORKSHOP OVERVIEW
SESSION 1
PROS AND CONS OF A VOLUNTEER PROGRAM
SESSION ACTIVITIES:
• AGENCY ASSESSMENT
• BRAINSTORMING PROS AND CONS OF USING VOLUNTEERS
• DEVELOPING COUNTER ARGUMENTS TO CONS
SESSION 2
PRINCIPLES OF AN EFFECTIVE VOLUNTEER PROGRAM
SESSION ACTIVITIES:
• FILMSTRIP "EIGHT"
• RELATING PRINCIPLES TO PROBLEMS



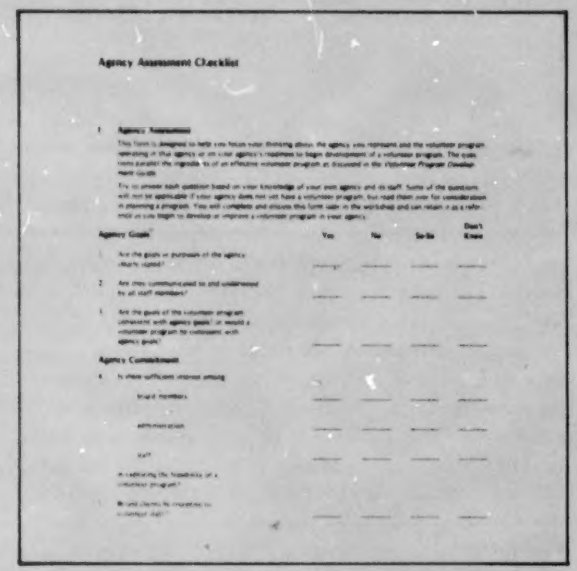
Next, participants are introduced to the *Volunteer Program Development Guide.* Relevant sections of the text are pointed out and related to the session contents. Section I of the guide covers the principles of an effective volunteer program, the topic addressed in session 2. Sections II, III, and IV are detailed descriptions of planning, designing, and implementing a pilot volunteer program, the topic of session 3. Section V identifies various resources available to program planners. In addition to reinforcing workshop contents, making the participants familiar with the guide from the beginning of the workshop will encourage and facilitate its use as the take-home reference for which it is primarily intended. It is helpful to point out that participants need not take extensive notes during the sessions since detailed information, particularly on program planning, is available in the text.

The guide may also address participant needs not covered specifically during workshop sessions. For example, a participant who is particularly interested in information about training volunteers may be referred to the extensive list of publications in section V. Another may be interested in how to recruit and select volunteers. This topic is covered in some detail in the text and additional reading is suggested in the resource section. It is therefore particularly important that the trainer be familiar with the contents of the guide.

Participant expectations that will not be met by the workshop training or in the guide should definitely not be ignored. The trainer or resource person may be able to deal with some concerns during breaks between sessions, or some of the other participants may have needed information or experience or know of relevant resources; they should be encouraged to contribute this knowledge. Even if there is no immediate answer to a concern or expectation, the trainer's open acknowledgement of this fact will lessen dissatisfaction and forestall the likelihood of passive or resistant behavior by trainees.

Agency Assessment Checklist (D)

In this exercise, trainees work independently for a few minutes to complete part I and read over part II of the Agency Assessment Checklist (handout 3). The topics in this checklist parallel material to be covered later in the workshop. This 15-minute activity is in the training sequence at this point to help trainees connect what they are about to hear and see with what they know to be reality in their own agencies. The checklists are completed and processed in session 4.



Agency Assessment Checklist

Participants may not be able to answer many of the questions on the checklist; this does not matter because the purpose of the activity is to stimulate thought rather than to provide immediate answers. The trainer should reinforce this idea if participants become anxious about not having all the answers.

The trainer should also point out that the checklist is not to be handed in or evaluated in any way but is strictly for the trainees' own use, both later during the workshop and on return to their agencies.

Pros and Cons of Using Volunteers—Brainstorming Exercise (E)

The brainstorming activity provides a good look at the attitudes and feelings about using volunteers that participants need to deal with within their own agencies and communities as well as in their own minds. The activity also identifies the problems that become the basis of discussion for the next two sessions, in which principles and planning procedures are introduced and applied. (See appendix A for further discussion of the brainstorming process.)

A flipchart is suggested for this exercise because it is easy to use and provides a permanent record. Alternatively, a large chalkboard can be used or large sheets of paper can be taped to the wall.

There is usually no problem in getting participants to offer a wealth of pros and cons during this activity. The trainer should be very familiar with the lists of pros and cons provided in the *Session Outline Cards* and be prepared to elicit any important items that are overlooked with trigger questions, for example, "What effect will the addition of volunteers have on your agency's relations with the community?" "How will paid staff feel about volunteers?"

Most of the cons will be fairly simple problems that are worked out in careful planning and management procedures—items such as "Volunteers are unreliable." "Volunteers won't observe confidentiality." These are the kinds of problems the workshop addresses. Some of the cons may be philosophical issues, such as "Volunteerism is another way to discriminate against women," "Using volunteers allows government agencies to avoid responsibilities," "Volunteers take paying jobs away from those who need them," These issues, points on which individual agencies must take a philosophical position, are *not* addressed by the workshop.

If issues like these arise, it is the trainer's option to decide how much discussion to give them. At the least, they should be defined and put into perspective as philosophical questions, as opposed to management problems. It is also up to the trainer to decide whether to elicit or draw attention to such issues. This kind of discussion will give greater depth to the exercise; it will also take more time. The decision will be based in part on the interest and sophistication of the trainees.

Counter Arguments to Cons—Small Group Discussion (F)

At this point, the group is divided into discussion groups of four or five participants and each group is assigned four or five problems from the "con" list for which they are to develop counterarguments.

The primary purpose of the activity is to allow the participants to explore and develop alternative viewpoints to the reasons for not using volunteers. This is clearly a more active learning approach than having the trainer provide answers. A secondary purpose is to give participants an opportunity to interact and share information.

Transparency C is used to explain the procedure for small group work.

In assigning groups, the trainer may want to make a point of seeing that each group includes both more and less experienced participants, or individuals who have and who do not have a volunteer program in the agen-

SESSION 1: *INSTRUCTIONS FOR SMALL GROUP WORK*

1. **GROUPS OF 4 OR 5 PARTICIPANTS ARE ESTABLISHED.**
2. **A RECORDER IS CHOSEN FOR EACH GROUP.**
3. **RECORDERS COPY THE "CONS" OR PROBLEMS ASSIGNED TO THEIR GROUPS.**
4. **GROUPS ASSEMBLE AND DEVELOP COUNTER ARGUMENTS FOR AS MANY OF THE ASSIGNED PROBLEMS AS POSSIBLE.**
5. **RECORDERS TAKE NOTES AND PREPARE TO MAKE A 3-5 MINUTE REPORT TO THE LARGE GROUP.**

cies they represent. Group recorders may either be assigned by the trainer or chosen by the groups.

During small group work, the trainer should circulate to make sure that the task is understood and the groups are on course. The trainer may want to go from group to group playing devil's advocate, asking groups to persuade him or her that a reason against using volunteers is not valid. (See appendix A for further discussion of small group work.)

Counterarguments—Large Group Discussion (G)

The large group is reconvened and the "cons" and their counterarguments are presented and discussed. This activity allows participants to share the learning that has taken place in small groups.

During large group discussion, the trainer should hold off on indepth discussion of questions that relate particularly to the work of later sessions. These problems are addressed again in discussion of principles and the stages of program planning. (See appendix A for more about large group discussion.)

Summary and Conclusion of Session (H)

The trainer summarizes the session as having allowed participants to get acquainted with each other and the contents of the workshop; to focus, by means of the Agency Assessment Checklist, on conditions in their own agencies; and to crystallize their own thinking about the pros and cons of using volunteers. As a preface to the following sessions, participants are reminded that some of the questions and problems that have arisen in the session will be discussed again in sessions 2 and 3 in relation to principles and program planning.

The session summary provides another opportunity to get feedback from the participants about their expectations and concerns now that they are warmed up and involved in the topic.

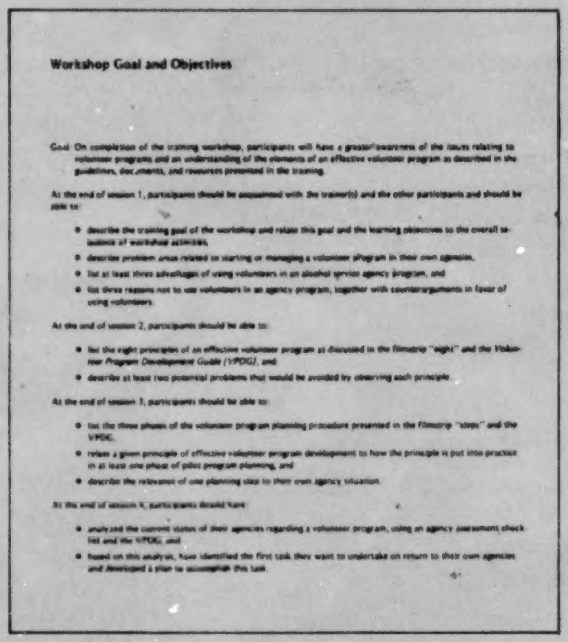
Breaks of a few minutes are suggested between sessions, their length depending on how the schedule is running and participant and trainer needs.

Session 2: Principles of An Effective Volunteer Program — 1½ Hours

Opening Remarks (A)

The purpose of this session is to introduce participants to the principles underlying an effective volunteer program and to allow them to relate these principles to the problems identified in session 1.

Refer participants to handout 2 to establish session objectives.



Workshop Goal and Objectives

Goal: On completion of the training workshop, participants will have a greater awareness of the issues relating to volunteer programs and an understanding of the elements of an effective volunteer program as described in the guidelines, documents, and resources presented in the training.

At the end of session 1, participants should be acquainted with the trainer(s) and the other participants and should be able to:

- describe the training goal of the workshop and relate this goal and the learning objectives to the overall objectives of workshop activities,
- describe problem areas related to starting or managing a volunteer program in their own agencies,
- list at least three advantages of using volunteers in an alcohol service agency program, and
- list three reasons not to use volunteers in an agency program, together with counterarguments in favor of using volunteers.

At the end of session 2, participants should be able to:

- list the eight principles of an effective volunteer program as discussed in the filmstrip "eight" and the *Volunteer Program Development Guide (VPDG)*, and
- describe at least two potential problems that would be avoided by observing each principle.

At the end of session 3, participants should be able to:

- list the three phases of the volunteer program planning procedure presented in the filmstrip "steps" and the VPDG,
- relate a given principle of effective volunteer program development to how the principle is put into practice in at least one phase of jobs program planning, and
- describe the relevance of one planning step to their own agency situation.

At the end of session 4, participants should have:

- analyzed the current status of their agencies regarding a volunteer program, using an agency assessment checklist and the VPDG, and
- based on this analysis, have identified the first task they want to undertake on return to their own agencies and developed a plan to accomplish this task.

Introduction of Filmstrip, "eight" (B)

The filmstrip presents eight principles underlying an effective volunteer program, in the context of the kinds of problems these principles address. The introduction of these principles forms the basis for group discussion.

In introducing the filmstrip, ask participants to think about:

- ways in which the principles discussed apply to the problems identified in session 1;
- implications of these principles for agency administration, staff, and program planners; and
- circumstances in their own agencies for which these principles have applicability.

Suggest that participants don't need to try to take notes while watching the filmstrip, because the principles are written out on handout 4 for reference during group discussion and are further discussed in section I of the *Volunteer Program Development Guide.*

Filmstrip Viewing (C)

The projector should be loaded and the screen adjusted before the start of the session. (Instructions for loading and operating filmstrip projectors are given on page 55.) To use filmstrip with automatic sound filmstrip projector:

- Advance filmstrip to focus frame and adjust focus.
- Advance filmstrip to black frame and start cassette player, using side of tape marked "inaudible cue." The projector will then advance the filmstrip automatically according to inaudible cues on the cassette tape.

To use filmstrip with manually operated projector and separate audiotape cassette player:

- Advance filmstrip to focus frame and adjust focus.
- Advance filmstrip to black frame and start cassette tape on separate player, using side of cassette marked "audible cue."
- Advance filmstrip manually, following the audible cues on the tape. If you find the audible cue intrusive, you can use the script below for timing. For frames with no narration, advance on the beat of the music at the specified 1-second or 2-second intervals. Some practice will be required for smooth coordination of visuals and sound.

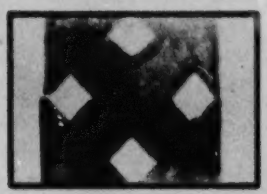
Visuals and script for the filmstrip are reproduced below.

"eight"

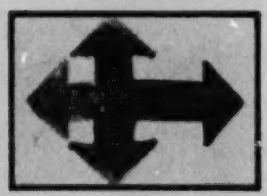
Principles of Effective Volunteer Program Development (5 seconds)

Produced by the National Center for Alcohol Education (10 seconds)

Volunteers can really get the job done!



Throughout our recent social service and political history,

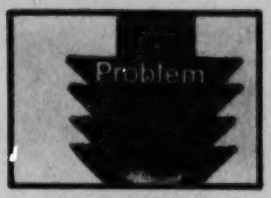


volunteers have moved all kinds of institutions and

persuasions into taking action, making progress, meeting needs.

Volunteers have helped agencies stretch diminishing dollars and enrich their services.

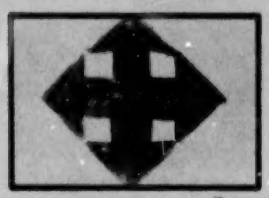
But using and managing volunteers has been a



problem for many social service groups,

including alcoholism service delivery agencies.

Program directors, supervisors, and staff are often reluctant to consider using



volunteers to extend and complement staff services.

Many believe that volunteers are undependable,

that they can't be supervised,

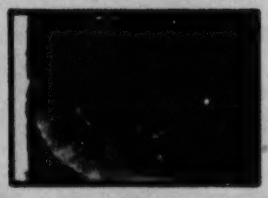
they "burn out," they're unprofessional.

They feel that staff and clients distrust volunteers,

that volunteers violate confidentiality,

that they are disruptive, irresponsible,

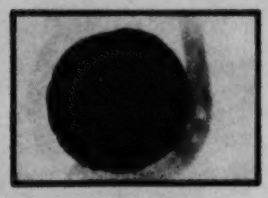
inflexible "do-gooders." Are these



fears well-founded? Not necessarily. Volunteers

won't present these problems if a volunteer program is planned and

implemented with eight basic principles in mind.



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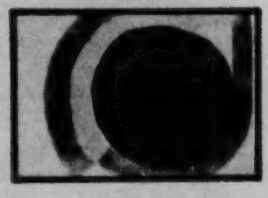

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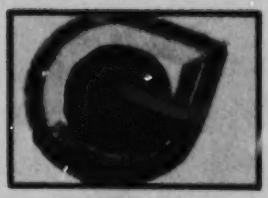
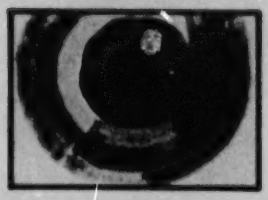
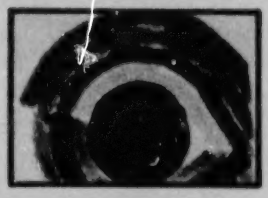






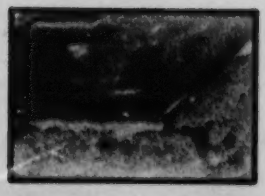
MUSIC—continued

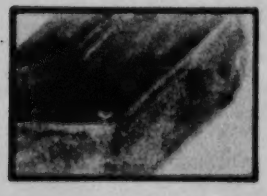
The first principle, agency commitment to a volunteer program, is crucial.

The agency's policymaking body must be willing to allocate funds, provide staff time, and delegate authority to a volunteer coordinator qualified to plan and implement the program.

Staff must be committed to the program, through involvement in its development from the beginning, and the volunteer coordinator must have their support.

Total agency support will ensure client confidence in the program. The agency *must* be committed to the idea of a volunteer program.





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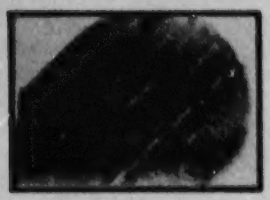

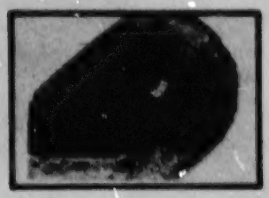

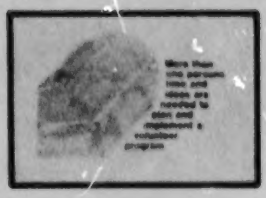

MUSIC—continued

It takes more than one person to plan a volunteer program. A planning committee should be appointed at the very beginning, including agency administrators, key staff members, and perhaps former clients.

Those who have experience with volunteer programs in other community agencies should also be included. The more experience, ideas, and resources brought to the task of planning and designing a volunteer program, the better—don't face it alone.

MUSIC—ADVANCE FRAME ON BEAT OR APPROXIMATELY EVERY 2 SECONDS.

MUSIC—continued

Start small, with a pilot program. That way, plans and procedures can be tested and corrections and improvements made before the program is expanded and larger numbers of volunteers are involved. Fine-tuning a pilot program will eliminate a multitude of difficulties in supervising and managing volunteers. The initial program should be a pilot program.

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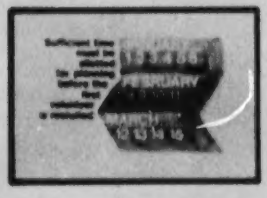
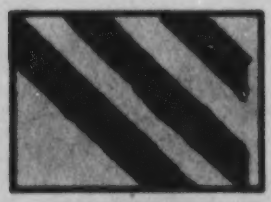


Sufficient time must be taken for planning before the first volunteer is recruited. Nothing is more disastrous than a horde of eager volunteers at the agency doors before solid plans have been made for selecting and orienting volunteers and for assigning them to specific jobs. Walk, don't run. Sufficient time must be allotted for planning before the first volunteer is recruited.

MUSIC—ADVANCE FRAME ON BEAT OR APPROXIMATELY EVERY 2 SECONDS.

The volunteer program must be an integral part of the total agency program. As a "fifth wheel" with little relevance to the agency's goals and services, the program will soon collapse.



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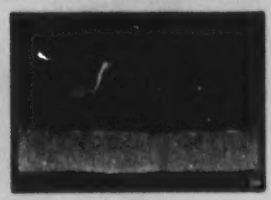

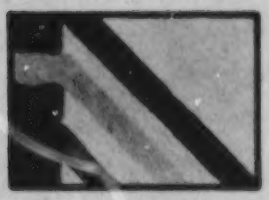

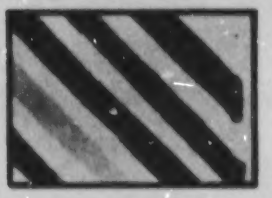

And the volunteer must be an integral part of agency staff. Volunteers *are* staff members, even though unpaid, and should be subject to the same management policies and procedures as paid staff.

Volunteers who see themselves as an integral part of agency staff are unlikely to be disruptive or irresponsible.

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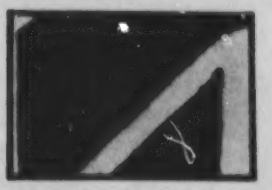
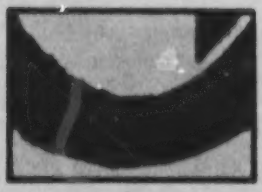




MUSIC—continued

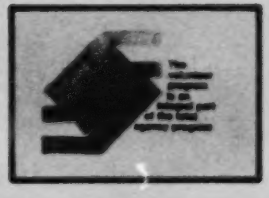
Volunteers have many motives for offering their services, but it's a two-way street. Motivation must be sustained by the knowledge that their work is needed and valuable. Public recognition is usually welcome, but informal recognition from day to day, regular performance evaluations, and opportunities to grow into increased responsibility are even more important incentives. Volunteer incentives are critical to program success.

MUSIC—ADVANCE FRAME ON BEAT OR APPROXIMATELY EVERY 2 SECONDS.

Program monitoring and evaluation are essential. The worth of the program can be measured in objective terms of new services offered, additional clients served, greater community recognition of the agency's program, or a newsletter that didn't exist before. Equally important are the intangibles. Do volunteers feel their work is rewarding? Are administrators and staff eager to expand the program? Are clients pleased with volunteer services?

Both kinds of information are needed to use volunteers effectively, to correct any problems—to ensure that the program is worthwhile. Monitoring and evaluation are essential.

MUSIC—ADVANCE FRAME ON BEAT OR APPROXIMATELY EVERY 3 SECONDS.



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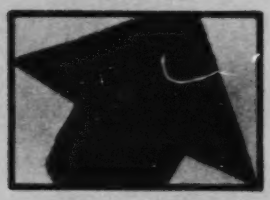
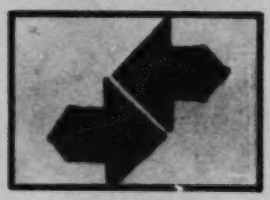
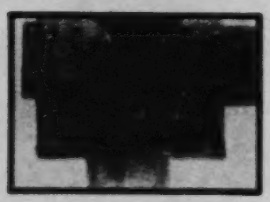


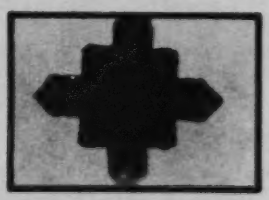
There is a large conceptual difference between using unpaid help and



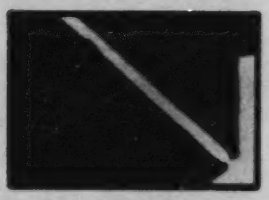
designing and implementing a volunteer program.



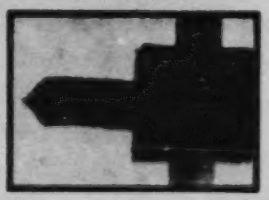
Like any agency program, it requires commitment,



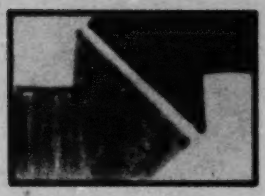
planning, and ongoing evaluation. It must be



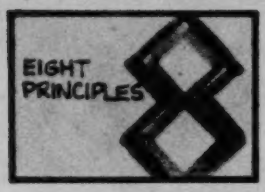
fully integrated into the total agency program and



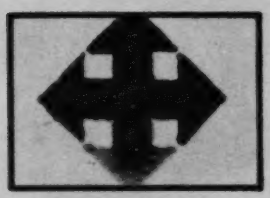
maintained with the continuing motivation of



both paid and unpaid staff. When these



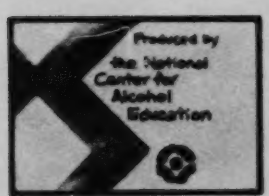
eight principles are observed, a



volunteer program can be invaluable

to an alcoholism service agency.

MUSIC—ADVANCE FRAME ON BEAT OR APPROXIMATELY EVERY 2 SECONDS.



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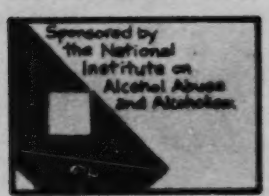
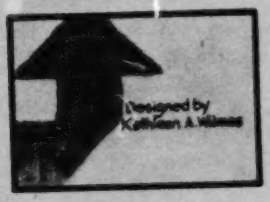


Sponsored by the National Institute on Alcohol Abuse and Alcoholism

Administered by the University Research Corporation Contract Number ADM-281-75-0013

Written and produced by Ann Holoka



Designed by Kathleen A. Wilmes

Music and narration by Jim Evans

Design Center Inc.

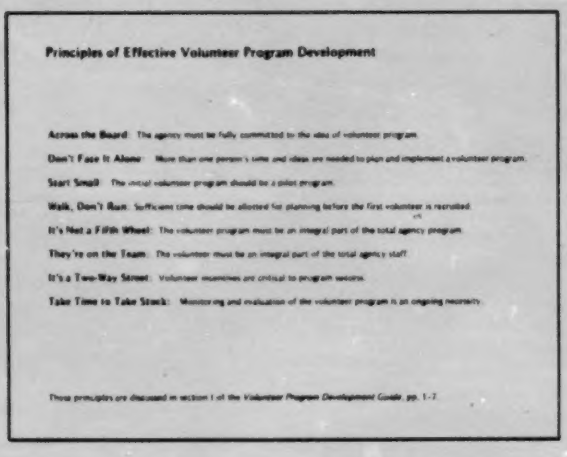
The End

Discussion of Filmstrip (D)

Discussion of the filmstrip should focus on applying the eight principles in participants' own agencies and to the potential problems identified in session 1.

This followup discussion helps to reinforce the principles introduced in the filmstrip, provides a framework for thinking about establishing or modifying a volunteer program in a way that avoids anticipated problems or solves existing problems, and develops a context for the planning process presented in the following session.

Participants are referred to handout 4.



Principles of Effective Volunteer Program Development

Across the Board: The agency must be fully committed to the idea of volunteer program.

Don't Face It Alone: More than one person's time and ideas are needed to plan and implement a volunteer program.

Start Small: The initial volunteer program should be a pilot program.

Walk, Don't Run: Sufficient time should be allotted for planning before the first volunteer is recruited.

It's Not a Fifth Wheel: The volunteer program must be an integral part of the total agency program.

They're on the Team: The volunteer must be an integral part of the total agency staff.

It's a Two-Way Street: Volunteer incentives are critical to program success.

Take Time to Take Stock: Monitoring and evaluation of the volunteer program is an ongoing necessity.

These principles are discussed in section I of the *Volunteer Program Development Guide*, pp. 1–7.

Each of the principles should be reviewed and discussed in turn. Optional trigger questions are included in the *Session Outline Cards.* For discussion to be meaningful, participants must first accept or reject the eight principles as valid and applicable. If doubts are expressed about the validity of any or all of the principles, these reservations should be discussed and alternatives invited.

During discussion, problems from session 1 can be referred to when it becomes obvious that a given principle applies.

The emphasis of the discussion is on the importance of these principles as an underlying philosophy of agency responsibility for an effective volunteer program. Specific planning procedures, based on these principles, are discussed in session 3 and should not be gone into in this discussion.

Summary and Conclusion of Session (E)

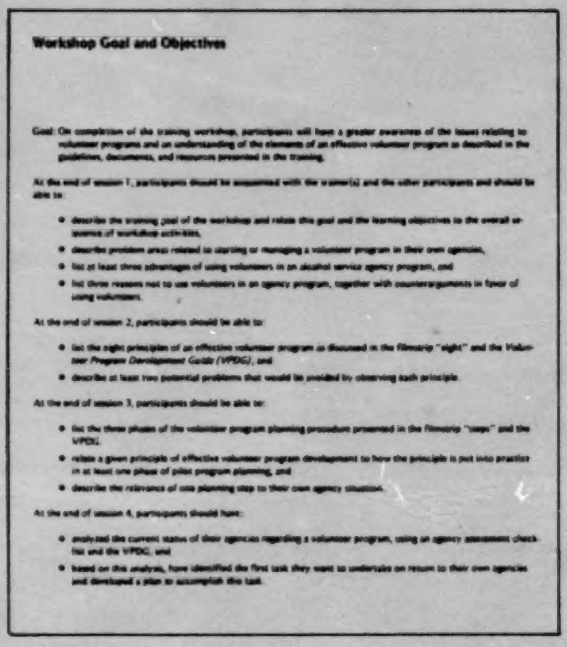
The session can be summarized as having introduced principles that address all or most of the problems confronted in planning and implementing a volunteer program. How these principles are applied will depend on the size of the agency, the nature of the program, available community resources, and needs of administration, staff, and clients. Specific steps in the exploration, design, and implementation phases of a pilot program are to be discussed in session 3.

Session 3: Planning a Pilot Volunteer Program — 2 Hours

Opening Remarks (A)

In this session, participants are introduced to a step-by-step planning procedure for establishing a pilot volunteer program. They discuss how the principles introduced in the preceding session are put into effect in the planning process and how specific steps may be carried out in the context of their own agencies.

Refer participants to handout 2 to review this session's objectives.



Workshop Goal and Objectives

Goal: On completion of the training workshop, participants will have a greater awareness of the issues relating to volunteer programs and an understanding of the elements of an effective volunteer program as described in the guidelines, documents, and resources presented in the training.

At the end of session 1, participants should be acquainted with the trainer(s) and the other participants and should be able to:

- describe the training goal of the workshop and relate this goal and the learning objectives to the overall sequence of workshop activities,
- describe problem areas related to starting or managing a volunteer program in their own agencies,
- list at least three advantages of using volunteers in an alcohol service agency program, and
- list three reasons not to use volunteers in an agency program, together with counterarguments in favor of using volunteers.

At the end of session 2, participants should be able to:

- list the eight principles of an effective volunteer program as discussed in the filmstrip "eight" and the *Volunteer Program Development Guide (VPDG)*, and
- describe at least two potential problems that would be avoided by observing each principle.

At the end of session 3, participants should be able to:

- list the three phases of the volunteer program planning procedure presented in the filmstrip "steps" and the VPDG,
- relate a given principle of effective volunteer program development to how the principle is put into practice in at least one phase of pilot program planning, and
- describe the relevance of one planning step to their own agency situation.

At the end of session 4, participants should have:

- analyzed the current status of their agencies regarding a volunteer program, using an agency assessment checklist and the VPDG, and
- based on the analysis, have identified the first task they want to undertake on return to their own agencies and developed a plan to accomplish the task.

Introduction of Filmstrip, "steps" (B)

The filmstrip, "step," presents a planning process conceived in three phases: exploration, design, and implementation. Specific steps are outlined for carrying out each phase of program planning.

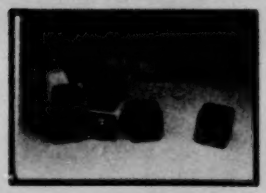
In introducing the filmstrip, ask participants to think about:

- ways in which the planning process relates to the principles discussed in session 2, and
- applicability of the planning process to their own agency circumstances.

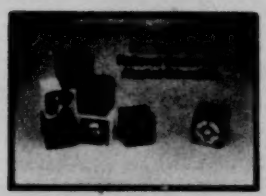
Showing of Filmstrip (C)

The projector should be loaded and the screen adjusted before the start of the session. (Instructions for filmstrip projector set-up and operation are on page 55.) The visuals and script of the filmstrip are provided below. See operating instructions on page 10.

"steps"



A Systematic Process for Planning, Implementing, and Maintaining a Volunteer Program



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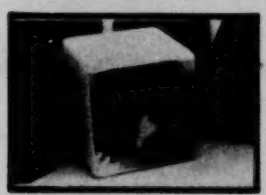
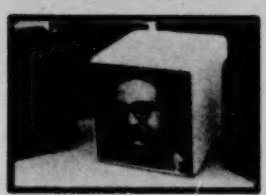
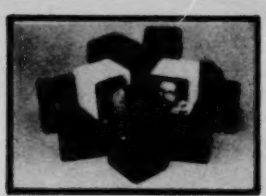


Adam: Come in.

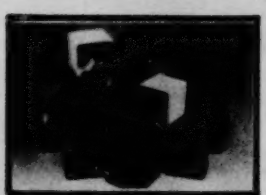
Sandy: Hi, Adam, how are you? Good to see you again.



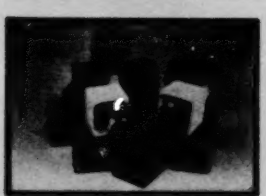
Adam: Hi, Sandy. Thanks for stopping by. I really need some help and you're one of the



few people I know who can help me. Tom asked me last week to get a volunteer program started here, but

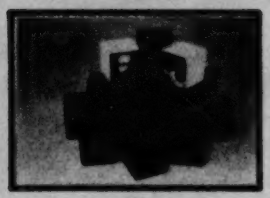


I haven't the vaguest idea what to do first. You've had a lot of experience with running a volunteer program. How do I go about it?"



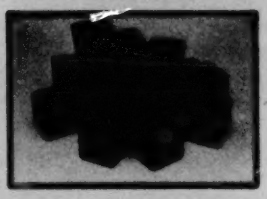
Sandy: (laughter) By approaching the job one step at a time—systematically. I've used the planning process outlined in the

Volunteer Program Development Guide that was done by the National Center for Alcohol Education. I brought one along for you to read.



Why don't I tell you about the planning process now? You can read the book later. The guide divides the planning process into

three major activities: an exploration phase, a pilot program design phase, and an implementation phase.



Adam: By exploration phase, I guess you mean time to begin to find out whether we really can use volunteers, and whether starting a program is feasible for us.

Sandy: Yes, that's right.

First of all you're going to need some help. Ask Tom, your director, to sit down with you and help you line up some people to serve on a planning committee.

Adam: Aside from some staff and Tom, who should be on it?

Sandy: You'll want some representation from several community service agencies,

including some that have volunteer programs,

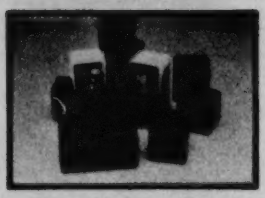
and possibly some former clients. The more heads

to help, the better.

Adam: Okay, I can think of a

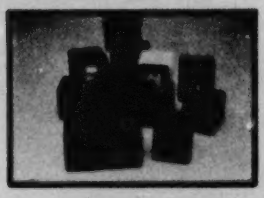
few people right off the top of my head who might

be interested. Let's go on; what's next?

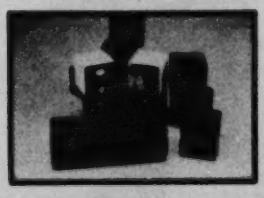


Sandy: The first thing you and the planning committee have to do is take a look at your agency's goals to see if volunteers can be used to achieve them.

For instance, if one of your agency's goals is, say, to increase community understanding of alcoholism as a treatable illness,

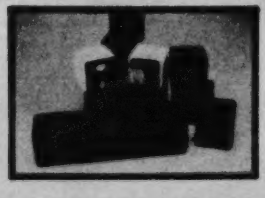


the question to ask is, "Can volunteers be used effectively in an organized way to help achieve that goal?" This kind of analysis should give you some answers not only about whether to use volunteers, but also some general direction about

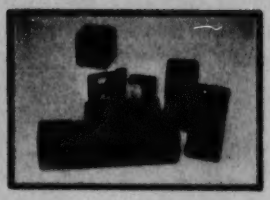


how to use them.

Next you need to gather some information.



What are volunteers doing in your community? What agencies are using volunteers, and how?

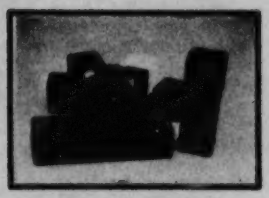


What community resources are available to draw on to help design or operate your program?

Adam: And then I'm going to have to find out what our specific needs for a volunteer program are, right?

Sandy: Exactly.

Adam: Very likely Tom has some



specific administrative needs in mind, perhaps some fundraising or public relations. And we'll need

to ask clients for suggestions too.

As far as that goes, I can think of some

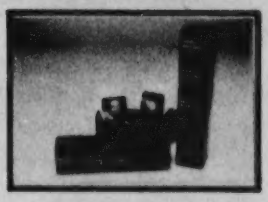
things we need right now. We do

need some help with transportation—getting clients to A.A. meetings—and

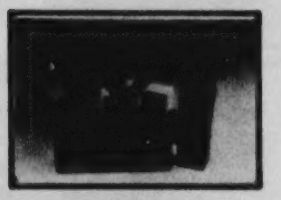
I've heard some of the staff talk about needing some additional

help with the occupational therapy service. Apparently some of the clients

aren't interested in the activities we have available now.



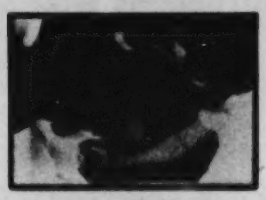
Sandy: Yes, don't forget to ask staff. It's *so* important to involve staff in your program.



Find out what they want to do but don't have time to do.

Their needs may range from help with

intake paperwork to updates on the latest alcohol



research. Regardless of the need,

you should be able to find a volunteer who has the necessary skills.

After you and the committee have canvassed everyone and taken a look at your community's resources,

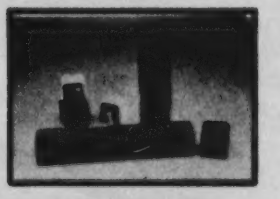
you'll need several work sessions to put

all the information you've gathered into perspective and to put

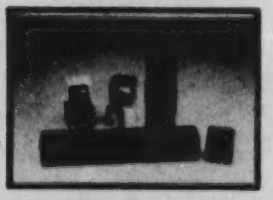
together a proposal for your volunteer

program so you can submit it to the board of directors.

The board will have to understand what's involved in operating a volunteer program—



that volunteers are not free. They require



staff time and other agency resources

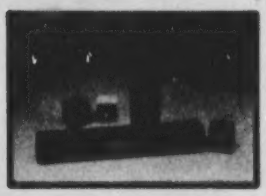
including money and office space.

But they must also understand that the benefits of using volunteers,

expanded services, and advocates for the agency out there in the community, far outweigh the costs.

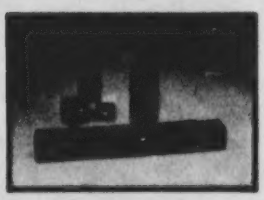
Following the board's decision to start

a program, the next step is to appoint a volunteer coordinator to actually plan and implement a pilot program.

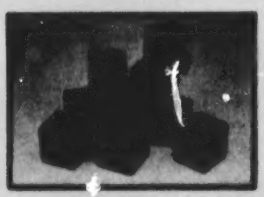


Adam: Okay, Sandy, assuming I'm given that responsibility, what do I do first—start recruiting volunteers?

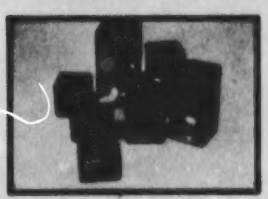
Sandy: No, this is



where you start on phase 2 in the planning process—the pilot program design phase—and the first step here is to



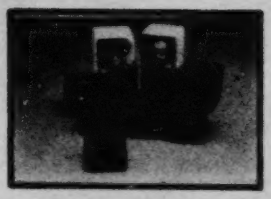
define the objectives of your pilot program and get them on paper. And I do mean a *pilot* program. Starting small gives you a chance to correct plans and procedures that don't work before you involve a large number of volunteers.



The first step in this phase is to spell out what you want your volunteers to be doing and by when. One objective might be that volunteers would provide instruction in six additional arts and crafts during the daily, 3-hour occupational therapy sessions.

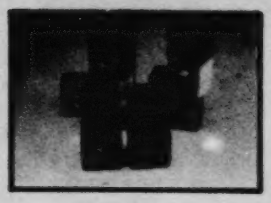
The program of instruction will begin in 3 months' time and will run for 6 months. The more specific you are with your objectives, the better; writing them in measurable terms will help you take stock of your plans and progress much more easily.

Adam: Okay, that's pretty clear.



What's next?

Sandy: Job descriptions. You'll need to get them on paper too so that *everyone*—staff, clients, and volunteers—will know what to expect.



Adam: Do I have to write job descriptions if they already exist for paid staff?

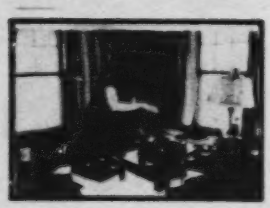
Sandy: Certainly not—if the volunteer is doing the same job, that is. I brought along with me one of the job descriptions we developed for our program. We needed someone to plan and produce some media presentations for us since we were being asked to do a lot of work with community groups.

The description we came up with really gets specific about the tasks

involved. We spelled out everything,

from script writing, editing, taping,

photographic skills, slide



production . . . even down to editing audiotape.

Adam: Wait a minute, Sandy, I'm beginning to get a little overwhelmed by all of this. I don't know whether we can do all of it or not. And I'll never remember all of these steps.

Sandy: (laughter) Don't worry Adam, it's all in the book I gave you.

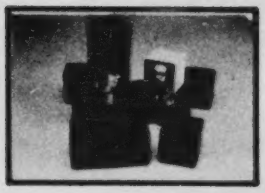
Adam: Okay. (relieved laughter)

What's next?

Sandy: Planning all the procedures you'll need for supervision, record-keeping, scheduling, space allocation, and clerical assistance.

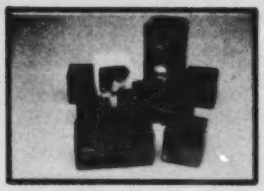
Adam: Is all this really necessary just to use some volunteers? It sounds like a lot of paperwork to me.

Sandy: Yes, it's necessary, Adam, but it's not really that much work.



There's a principle to keep in mind here. Your volunteer program should be an integral part of your total agency program. The procedures you use will be the same as, or adaptations of, those you use for paid staff. You don't have to work out new ones.

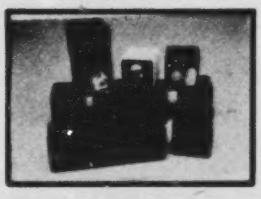
Adam: Okay. That makes a lot of sense. (pause) I think I'm about ready to come up with a



recruiting plan, aren't I?

Sandy: Yes, and by that time you'll know how many volunteer jobs you have available, and job descriptions for each of them.

It will be fairly simple then to identify some specific recruitment targets. You mentioned some additional instruction in occupational therapy. Depending on what clients' needs are, go to the places where people are using those



skills. Go to the local greenhouse owner;

talk to her about volunteering

her skills and abilities; see what's

involved as far as supplies and equipment

are concerned. If you

need a newsletter, you could approach the community college's journalism department;

some of the students might want

to volunteer their services to produce it. And maybe

course credits could be arranged for them.

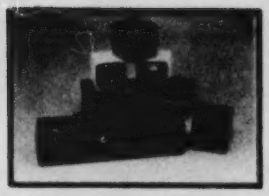
Adam: There

are more ways and places to recruit volunteers than I thought. What's the next step? I guess we'd have to figure out how we're going to actually select the volunteers we want.

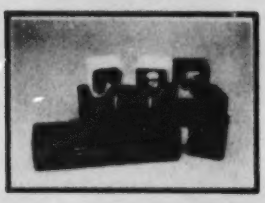
Sandy: Right, Adam,

and there are a number of decisions to make in developing some of the criteria for selecting them.

Those criteria should be based on how many jobs there are to be filled, and the job skills or experience needed to fill the position, and whether or not highly motivated people without the right job skills *could* do the work if they received on-the-job training.



You'll have to determine who makes the final decision about selection and placement, and what resources are needed to go through the selection process with an applicant.



Adam: I would imagine that the personal interview would be very important in this selection process.

Sandy: Yes, it is. What are some of the things you would attempt

to learn during the interview?

Adam: Certainly

one area to cover is the person's understanding of and feelings about alcoholism. And I think

it would be important to try to determine what his or her motivations are for

volunteering.

Sandy: Right, and you'll also want to get some sense

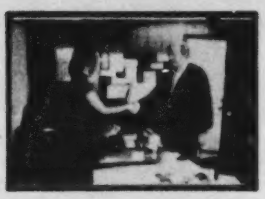
of whether the applicant's personality would complement those of the staff and other volunteers,

and try to get a fix on the person's general maturity, sensitivity, and

flexibility, as well as his or her personal interests. Also, the information and

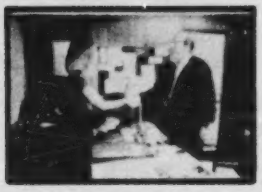
insights you get during the interview will give you a pretty good idea how

much orientation to the agency the volunteer will need.



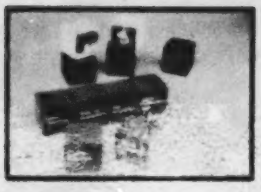
We don't have to spend a lot of time on this right now. The book I gave you goes into this step pretty thoroughly.

What do you think is the next step, Adam?



Adam: Let's see. Orienting the volunteers to our agency, I guess. They'll have to know what our services are, who staff is, our personnel policies, whatever we decide to do about insurance coverage and reimbursement for travel expenses—basic information about what we do—what we're all about.

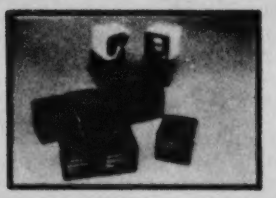
Sandy: Right,



and next?

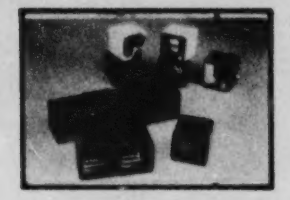
Adam: Training. A plan for training volunteers.

Sandy: Yes, and the extent of the training you'll have to plan for will depend on the volunteers you select for the program.



If you're able to recruit and select volunteers whose skills match your job descriptions, training won't be necessary.

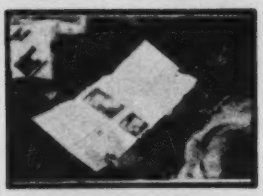
During the time I was working at the rehabilitation center, several of our volunteers expressed an



interest in doing some work in the area of prevention.

So we set up some self-instructional sessions for them, using the alcohol facts material from the

Decisions and Drinking series, also developed by the National Center for Alcohol Education.



We also had them work with the slide shows another

volunteer developed about our center's work.

Then we were able to respond to all

the requests from community groups to talk about our program.

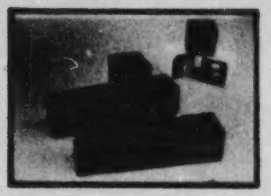
Adam: Okay, what's next?

Sandy: One of the most important aspects

of your planning—evaluation. Plan to find out whether, and how, your program is working, both in dollars-and-cents terms and how people feel about it. If the program is cost-efficient but nobody feels good about it, chances are it's not going to function very well.

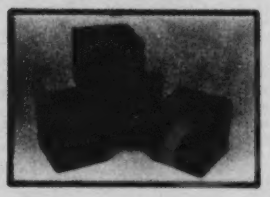
Adam: What about the money end of all this, Sandy?

Sandy: Well, you're going to have to keep your budget in mind as you work through the program design phase, Adam.



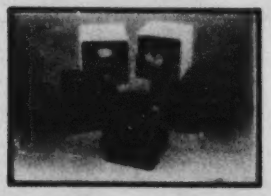
And you might want to think of alternative ways to handle some of the costs involved.

Adam: Well, I



imagine we're ready for phase 3, right?

Sandy: Right, Adam, and a very important step in the implementation of the pilot program



is the orientation of your staff to the volunteer program.

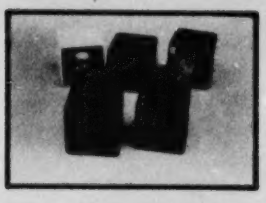
As I said earlier, staff involvement in the planning of your program is

crucial from the beginning, but all staff

must be informed and kept up-to-date on the specific

plans for the program as you begin to operate it.

Adam: And I guess we can begin



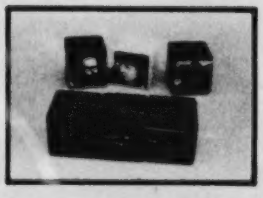
to recruit our volunteers at this point and work our way through all of the procedures and plans we've established.

Sandy: Yes, and don't forget one last thing, something essential to the health of the

program. Recognition of the contributions your volunteers make.

Adam: You mean have an annual banquet?

Sandy: Well, that's one form of recognition



but there are others that are more important.

Aside from informal communication—and lots of it—

job satisfaction and motivation can be maintained

in a number of ways. One is to make sure that your volunteers

receive regular job performance evaluations, just as your paid staff receive. If the job

is worth doing, it's worth evaluating. If you're interested

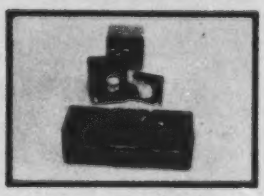
in a volunteer's performance, he or she will be, too.

And people will stay motivated if the job they're doing is providing work experience

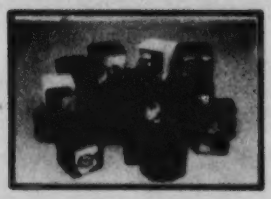
for an eventual salaried position or if their job responsibilities are increased from time to time. But the best form of recognition

depends on what the individual volunteer's needs are. It may

be a reference for a paid job, increased job responsibilities,



being publicly recognized as the volunteer of the month. (pause) Well, that's the process, Adam.

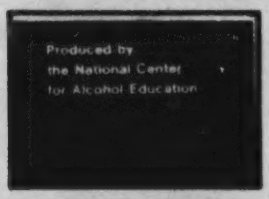


Very simply, consider volunteers as staff, and plan for and manage them and the program in the same way. I've always tried to run my program that way.

Adam: Sandy, thanks, you've really helped. I've got my work cut out for me, but i know where I'm going now. And thanks for the book.

Sandy: You're more than welcome, Adam. Give me a call later, and let me know how you're doing.

Adam: Goodbye, Sandy.



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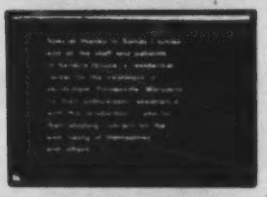


Special thanks to Sandy Clunies and all the staff and patients of Seneca House, a residential center for the treatment of alcoholism, Poolesville, Md., for their enthusiastic assistance with this production—and for their abiding concern for the well-being of themselves and others.

Additional thanks to the staff and volunteers of the Washington Area Council on Alcoholism and Drug Abuse for their assistance with this production.

Written and produced by Ann Holoka

Designed by Kathleen A. Wilmes

Photographed by Jim Fagiola

Produced by Design Center Inc.

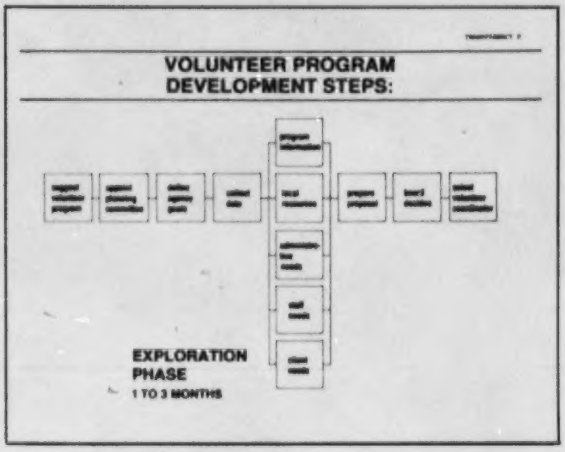
The End

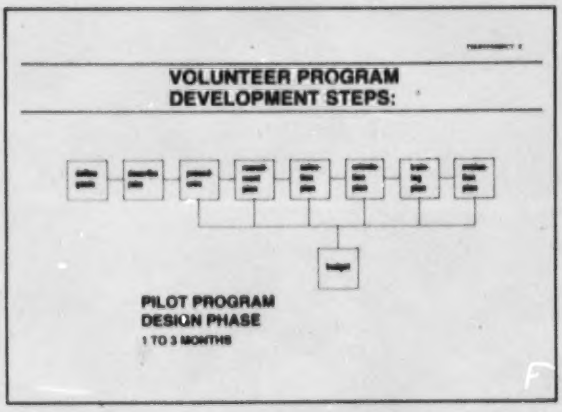
Discussion of Filmstrip (D)

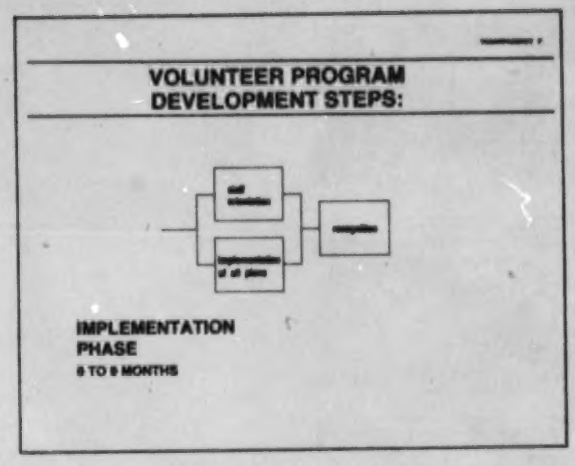
In preparing to lead a discussion of the filmstrip "steps," the trainer should be very familiar not only with the content of the filmstrip but also with sections II, III, and IV of the VPDG.

At the conclusion of the filmstrip showing, the trainer should relate the planning procedure to the principles introduced in session 2. Refer participants to the flowchart on page iv of the *Volunteer Program Development Guide* or to transparencies D, E, and F, which outline the whole planning procedure described in the filmstrip, and to the principles on handout 4.

Point out, or ask participants to point out, the relationship between specific principles and specific steps in the three phases. Take the step "Devise Recruitment Plan."







At least two principles have strong implications for recruitment planning:

Principle: Sufficient time must be allotted for planning before the first volunteer is recruited. Often the first impulse in getting a volunteer program underway is to see how many volunteers can be lined up. The steps outlined in the filmstrip, and in greater detail in the guide, make the pitfalls in such timing quite obvious.

Principle: The volunteer is an integral part of the total agency staff. In considering this principle as it relates to recruitment planning, it becomes clear that this understanding of volunteer commitment is very important in choosing recruiting strategies. The agency's expectations in terms of volunteer commitment must be communicated to potential volunteers. In turn, potential volunteers should also be informed of the kind of acceptance which they can expect from agency paid staff.

Planning Steps—Small Group Discussion (E)

In small group work, the focus is on specific steps in the planning procedure. There is too much material for every planning step to be discussed in detail. It is suggested that groups of four or five participants be formed to discuss a planning step that seems particularly relevant or especially problematic. The small groups then share their work with the other participants during a large group discussion.

Once topics have been selected, each group can begin by quickly reading through the pages of the *Volunteer Program Development Guide* which relate to the step they have chosen to discuss. (See page iv of the guide for the appropriate page number.) They can then discuss the planning step and prepare a presentation for the large group.

One way to prepare a presentation could be to let trainees structure a role play around a particular problem situation for presentation to the large group. A role

play provides both an effective means of group presentation and a rehearsal for what the trainee may need to be able to do in an actual planning situation in his or her agency.

Problems in planning steps that lend themselves to possible role play situations include:

- a meeting in which an agency director or volunteer coordinator is trying to gain support for a volunteer program from a skeptical board of trustees,
- a staff meeting to assess needs of administration and staff who feel overworked but are distrustful of the idea of using volunteers,
- a planning committee meeting to develop specific program objectives, to which each member comes with a different set of priorities,
- an interview with a prospective volunteer who is ready to solve the problems of the world and must be confronted with the goals of the agency program and a written job description.

These suggestions are only a few possibilities. The trainer can suggest additional ideas and/or allow the groups to come up with role play situations of their own.

For planning steps less well adapted to a role play situation, or for groups disinclined to use this technique, a planning step may simply be discussed in small groups, and one or more representatives from the small group may present the cumulative ideas to the large group.

Display transparency G to clarify the group task.

SESSION 3: *INSTRUCTIONS FOR SMALL GROUP WORK*

1. **GROUPS OF 4-5 PARTICIPANTS ARE ESTABLISHED.**
2. **EACH GROUP CHOOSES A STEP FROM THE PLANNING AND IMPLEMENTATION MODEL FOR DISCUSSION.**
3. **SMALL GROUPS CONVENE AND READ THE RELEVANT PAGES IN THE VPDG.**
4. **GROUPS PREPARE A PRESENTATION FOR THE LARGE GROUP.**
5. **LARGE GROUP RECONVENES; SMALL GROUPS MAKE PRESENTATIONS IN TURN.**

Planning Steps—Large Group Discussion (F)

When the large group is reconvened, each small group in turn makes its presentation. Participants' questions and comments are invited. Ten minutes are allowed to each of the small groups for presentation and discussion.

The purpose of this session is primarily to emphasize the importance of careful and detailed planning to the success of a volunteer program. In the remaining period of group discussion, the trainer will want to address this issue.

If some of the participants are from agencies with existing volunteer programs, they may be invited to discuss

- whether adequate time was spent in planning before their programs were implemented, and
- any problems that arose in the program due to insufficient planning time or details overlooked in the planning process.

If none of the participants has specific experience, the trainer (or resource person) may wish to share some of his or her own particularly relevant experiences in establishing or maintaining a volunteer program.

Summary and Conclusion of Session (G)

In summarizing the session, remind participants that

- the planning process is discussed thoroughly in the *Volunteer Program Development Guide*. Specific suggestions are offered for each development step. The guide should be used as a reference when participants return to their agencies and are ready to begin program planning or modification.
- the specific application of the planning procedure will vary depending on the nature of the program, the size of the agency, the resources available in the community, and the needs of agency staff, clients, and administration. The planning procedure presented in the guide is a model, meant to be adapted to participants' own particular situations.

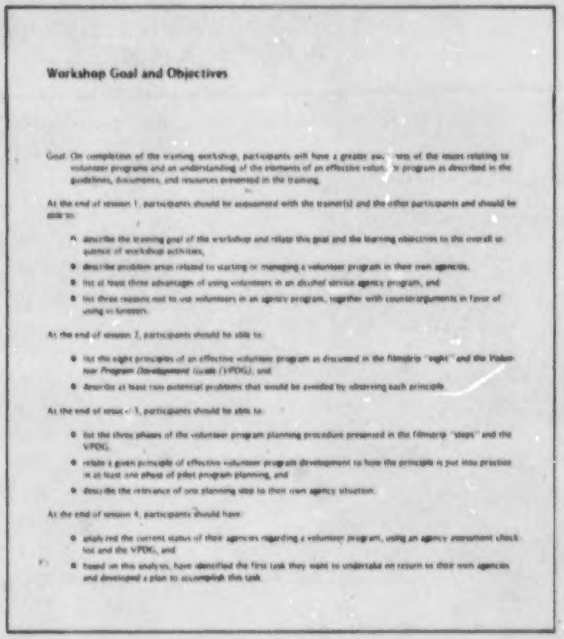
Session 4: Getting Started With Your Own Agency Program

Opening Remarks (A)

In this session, participants will complete the Agency Assessment Checklist introduced in session 1 and identify one or more primary concerns involved in beginning or improving a volunteer program in their own agencies. They will then meet in small groups to discuss their agency analyses and plans. Next, the large group will reconvene, recorders will give brief reports on the small group work, and the balance of the session will be devoted to large group discussion.

The purpose of this session is to allow participants to combine knowledge gained during the workshop with what they know about their own agencies to formulate a specific plan of action, and to have the opportunity to discuss these plans and benefit from suggestions and experience of other participants and the trainer or resource person.

Review session objectives on handout 2:



Workshop Goal and Objectives

Goal: On completion of the training workshop, participants will have a greater awareness of the issues relating to volunteer programs and an understanding of the elements of an effective volunteer program as described in the guidelines, documents, and resources presented in the training.

At the end of session 1, participants should be acquainted with the trainer(s) and the other participants and should be able to:

- describe the training goal of the workshop and relate this goal and the learning objectives to the overall sequence of workshop activities;
- describe problem areas related to starting or managing a volunteer program in their own agencies;
- list at least three advantages of using volunteers in an alcohol service agency program; and
- list three reasons not to use volunteers in an agency program, together with counterarguments in favor of using volunteers.

At the end of session 2, participants should be able to:

- list the eight principles of an effective volunteer program as discussed in the filmstrip "eight" and the *Volunteer Program Development Guide (VPDG)*; and
- describe at least two potential problems that would be avoided by observing each principle.

At the end of session 3, participants should be able to:

- list the three phases of the volunteer program planning procedure presented in the filmstrip "steps" and the VPDG;
- relate a given principle of effective volunteer program development to how the principle is put into practice in at least one phase of pilot program planning; and
- describe the relevance of one planning step to their own agency situation.

At the end of session 4, participants should have:

- analyzed the current status of their agencies regarding a volunteer program, using an agency assessment checklist and the VPDG; and
- based on this analysis, have identified the first task they want to undertake on return to their own agencies and developed a plan to accomplish this task.

Completion of Agency Assessment Checklist (B)

Participants are referred back to the Agency Assessment Checklist, handout 3, part I of which they completed in session 1.

Review of their responses to the questions in part I should enable participants to focus on one or two problem areas which they will develop an approach to solving in part II of the checklist. (See session 1.)

During this individual activity, the trainer is available to answer questions and make suggestions if participants are having difficulty in focusing their approach.

If participants have a large number of "no" or "so-so" responses in all areas, suggest that they focus on agency goals and/or agency commitment as the starting point, because these are basic issues underlying an effective volunteer program. For participants who have primarily "don't know" responses, the first task is research. They need to identify key people in the agency who can give them the answers they need.

Problems and Plans—Small Group Discussion (C)

Once participants have identified primary problem areas and begun to formulate plans for addressing these areas of concern, small groups are formed to allow participants to discuss their agency analyses and plans.

The groups may be formed according to problem areas, i.e., agency goals, agency commitment, planning, personnel policies, orientation and training, recognition, or evaluation. Those whose initial focus is further information-gathering may want to form a group or groups of their own.

During small group work, each participant is allotted 10 to 15 minutes, depending on the size of the group, to present his or her problem analysis and approach to solution and to receive suggestions from the others in the group.

Display transparency H to clarify small group task.

SESSION 4: *INSTRUCTIONS FOR SMALL GROUP WORK*

1. **GROUPS OF 5 OR 6 PARTICIPANTS ARE FORMED TO DISCUSS PROBLEM AREAS IN THEIR AGENCIES AND THEIR INITIAL PLANS.**
2. **A RECORDER IS CHOSEN FOR EACH GROUP.**
3. **EACH PARTICIPANT IN TURN PRESENTS HIS OR HER PROBLEM ANALYSIS AND APPROACH TO SOLUTION AND INVITES COMMENT AND SUGGESTIONS FROM THE GROUP.**
4. **RECORDER TAKES NOTES IN ORDER TO PRESENT SUMMARY TO LARGE GROUP.**

The trainer should be available to help any group having difficulty with this activity.

Problems and Plans—Large Group Discussion (D)

The large group discussion begins with a report from each recorder on the problems presented and the approaches considered in the small groups.

As each group reports, the trainer jots down on a flip-chart or chalkboard the key words that characterize the problem and the approach to solution.

After each presentation, the discussion is opened to questions, comments, and suggestions from the group.

If the group is composed primarily of participants from agencies without volunteer programs, the focus will most likely be on gathering further information and on promoting or testing agency commitment to a volunteer program. Participants with a volunteer program in existence will be more likely to focus on orientation and training, recognition, and evaluation as problem areas.

In a mixed group, the experience of those with an existing volunteer program will be very helpful to those just getting started.

Trigger questions are provided in the *Session Outline Cards* to aid in promoting group discussion.

Summary of Session (E)

By the end of the session, each participant should have a firm plan regarding the first steps he or she will take on return to the agency. The session should be summarized in terms of the kinds of problems presented and solutions discussed.

Summary and Conclusion of Workshop (F)

The summary and conclusion of the session provide an opportunity to review briefly the contents of the workshop and to entertain final questions or comments. Particularly if the trainer plans to conduct the workshop again, the methods of presentation, the material, the training site itself, and anything else that might affect future presentations may be discussed.

Evaluation Instrument (G)

An instrument is included in appendix E for optional use in evaluating the workshop.

Training Considerations and Techniques: Refresher Material

The ultimate success of any training program, regardless of how carefully designed, is related to the trainer's skill in delivery. For that reason, this appendix presents a brief review of the training know-how to maximize the effectiveness of these materials. Included are pointers on

- the adult trainee,
- the trainer's role,
- groups and how they behave,
- training methods, and
- use of audiovisual media.

The materials represent the accumulated wisdom of experienced trainers who have presented these materials and participated in countless other training programs. It can provide a useful, quick review for those already experienced in group leadership, and it can serve as a helpful beginning for those who are less experienced.

The Adult Trainee

Adults who attend training programs are usually seeking very specific, job-related skills or knowledge. In general, trainees are

- independent,
- experienced,
- problem-centered, and
- "now-oriented."

Thus, trainees have to feel that the learning is relevant to their needs before they are willing to accept it. For this reason, effective training has to be

- self-directed (the learner is involved in conducting the learning experience);
- experience-based (learning activities are planned around the participant's experiences);
- problem-centered (learning focuses on learner needs and problems, not on "covering" subjects); and
- immediate in application (learning can be put into action directly).

This training package is designed to provide participatory learning experiences through which trainees relate new information to their experiences and needs.

As the leader of adult learners, the trainer is responsible for creating the kind of open learning environment that enables trainees to share their experiences and individual expertise with other participants.

The Trainer's Role

Trainers use a number of different, and sometimes highly individualistic, approaches to conducting training sessions and meeting the needs of the adult learner. As a general rule, however, skilled trainers start by putting participants at ease. Drawing people out during the first session with questions about themselves and about their

expectations for the course allows participants to get to know each other and give guidelines about their needs. This approach also initiates involvement by participants. The physical environment also helps set the atmosphere for participant involvement. Arranging the seating in a circle or around a large table is conducive to informal exchange among attendees, rather than exchanges only between participants and the discussion leader.

As a second task, experienced trainers usually *set the group rules* by beginning each session with a clear statement of the topic, the activities to be included, and the learning objectives. After information is presented, the facilitator *initiates discussion.* If people are reluctant to speak first, the group leader often volunteers a comment, contributes information, or breaks the topic down into more specific questions.

The trainer sometimes must *provide information* to give the group some basis for learning and discussion. There also are times to *seek information.* This may require calling on participants with special knowledge or experience or bringing in an expert on the subject. Sometimes a participant can be asked to look up information and report back to the group.

Other trainer responsibilities include *keeping the discussion on the subject* and *making sure the learning activities stay on schedule.* Debriefing between sessions also helps structure the learning experiences.

A brief summary after learning activities and at the end of a session serves as a logical end to the activity and also gives trainees a roadmap to follow as they sort out where they are going and where they have been. In carrying out these tasks, it is important for a trainer to

- avoid seeming to pass judgment;
- make positive comments and give positive feedback;
- respect people's feelings;
- be aware of and candid about personal biases;
- avoid pretending to be an authority on subjects he or she doesn't know thoroughly; and
- be frank about his or her personal style of group leadership.

Groups and How They Behave

One of the tricks to being an effective trainer is in understanding how groups work. The successful facilitator knows what forces make people and groups act as they do and uses these dynamics to help guide the learning experience.

Two major factors shape the behavior of most groups. First, participants have to decide, "Do I really want to learn *this* from *you*?" As they make this decision, participants tend to test the trainer to decide whether they can accept his or her leadership. Sometimes acceptance is achieved shortly after the start of the session; at other times it may take longer. Another aspect of acceptance requires that the trainees decide to learn what is being presented. The participants have to analyze and, in a very real sense, agree to learn what the trainer offers. To guard against acceptance problems, the trainer should

- be thoroughly prepared for the presentation;
- make sure the logistics run smoothly;
- be frank about what he or she knows and does not know;
- clarify participant expectations at the very beginning of the training program;
- compare these expectations with the training objectives;
- highlight what will and will not be covered; and
- discuss how unmet expectations can be handled.

If there is a problem, some telltale signs include

- yawning,
- fidgeting,
- private conversations among participants,
- challenging or off-the-subject remarks, and
- questioning of the content validity.

When such problems arise, the trainer must deal with the issues openly to avoid bigger problems. He or she can

- reveal what is happening in terms of group processes;
- ask the group what can be done to satisfy its needs; and
- meet separately at a coffeebreak with discontented people and deal personally with their concerns.

The second dynamic which shapes group behavior is the need for each individual to locate himself within the structure of the group. This force is most obvious at the beginning of a training event when participants typically explore how to

- fit into the group;
- establish themselves as important members of the group;
- guard their vulnerabilities; and
- get attention and recognition.

The need for group recognition and membership often leads to behavior patterns that may interfere with learning. Trainers, therefore, need to be on the alert for the following types:

- Recognition seeker (constantly calls attention to himself or herself),

- Conversationalist (brings up off-the-subject, and often personal, anecdotes),
- Silent partner (sits quietly, daydreams, and does not participate),
- Sophisticate (assumes bored, know-it-all attitude),
- Moralizer (advocates judgmental points of view based on personal convictions),
- Conservative (convinced that status quo does not need changing),
- Aggressor (attacks attendees rather than their ideas),
- Theorizer (talks in abstract terms that often are unrelated to the discussion),
- Fatalist (believes that nothing can be done about a problem),
- Rationalist (believes only in logic and rejects emotional factors), and
- Thinker (appears to pay attention but does not participate).

Recognizing that these types of behavior are personal ways of coping with strains of fitting into a new group can help a trainer deal with them. Respectful, tactful treatment may integrate the problem individual into the group and neutralize the disruption. Keep in mind what underlies the behavior and try to respond to that need. Thus, try slowly to draw out the silent person without making him or her more self-conscious; give some recognition to the types who try to dominate a discussion, but be sure that others have equal opportunities to participate. To cut short the off-the-subject remark tactfully, ask those with an interest in the topic to get together at the next coffeebreak. Sometimes the group can help. For example, ask "What shall we do about keeping on schedule when so many people want to discuss personal problems?" The group members usually deal very effectively with the situation.

There is no simple technique for handling attention-seeking behavior in groups. A good trainer approaches each individual as a new problem, keeping in mind a few general rules:

- Deal with the disruption; if not handled immediately, it will just appear again, often as a bigger problem.
- Remember that you are the group leader and that challenges to that role should be met head-on.
- Keep in mind that your responsibility is to the whole group; no single individual should be allowed to disrupt the planned learning experiences.

Instructional Methods

To achieve its objectives, this training program uses an assortment of methods compatible with the basic principles of adult learning. Section II discusses *when* to use which method, and the following pointers tell *how* to use these techniques.

Discussion

Group discussion, one of the most frequently used techniques in training sessions, generally is initiated by the trainer's question or by information given in presentations, overhead transparencies, or reading material. The participants then contribute examples, observations, comments, and anecdotes from their own experiences in order to expand and illustrate some of the points made in the session. Some of the contributions provide striking, firsthand accounts from those who have dealt with different situations. Other comments and suggestions will not be effective contributions, but the diversity will bring the subject to life and make the sessions personal and meaningful.

Discussion is not just a rambling, formless conversation that jumps from topic to topic, but is focused and directed to a specific topic. The job of the facilitator is to ensure that the discussion remains relevant and that rambling is minimized.

Personal experiences can be valuable contributions to discussions, but some participants may be tempted to use the discussion as a confessional. Very difficult, emotionally charged situations that have little learning value can develop. Aim at achieving balanced participation from the group. Some people may want to "say their piece," but often others in the group are not interested in such speeches unless they directly relate to the subject.

As a discussion leader, it pays to be aware of body language, both your own and that of the participants. For example, the trainer can use gestures to keep the flow of conversation going. Pointing to an individual who has something to say is perfectly polite in this context. So is a hand signal encouraging someone to continue to elaborate. The direction of the trainer's attention itself is a powerful signal. As long as the leader is looking at someone, he or she will be encouraged to continue; just looking away or at someone else may cut the flow of speech.

A trainer's ability to ask good questions is the most useful tool for bringing discussions to life and keeping them focused on relevant topics. A probing question arrests the attention of the adult learner and permits the trainee to be self-directed in finding an answer, to draw on his or her own experience, and to focus on an issue, not an answer. Incisive questions also cast the

trainer in the role of a peer seeking answers, thus establishing a productive trainer-trainee relationship.

A few simple tips can help a trainer ask the kinds of questions that lead to fruitful and purposeful discussion:

- Ask questions that start with "how" or "why" rather than "what is." These questions will encourage the development of the learner's analytical skills. They do not bypass needed information. They make learners apply what they know and discover what they still need to find out.
- Ask questions that spark controversy and force people to disagree. Such questions serve to broaden minds and dispel the illusion that everything is black or white.
- Ask open-ended questions that have more than one right answer and are likely to elicit more than one response. For example, start with "In what ways. . .?" or "For what reasons. . .?" These kinds of questions foster a mind-set that is open to the nuances required to understand the complexity of most topics.
- Don't put people on the spot with such questions as "What is the chemical formula for. . .?" or "Does anyone understand. . .?" An inability to answer the first question or an honest "no" answer to the second would make someone feel stupid.

Role Plays and Simulations

Role plays and simulation activities require participants to assume the part of another individual in a problem-solving or conflict situation. These activities provide opportunities for the participant players to examine attitudes and behavior as they portray persons with different points of view and positions in life. From these experiences, trainees may develop empathy with others in situations that differ from their own. Moreover, by helping resolve a conflict or solve a problem in which they are not really personally involved, participants can gain new insights to their own behavior.

Before starting the role play, a director should be appointed. The trainer may serve in this capacity or may call upon an experienced person from the group. It is the director's responsibility to oversee the activity. He or she sets the stage, selects the participants or asks for volunteers, and makes sure that people portray their assigned roles rather than themselves during the activity. Another responsibility of the director is assuring that no participant is attacked personally. Conflict may develop between characters, but the distinction between the role being played and the individual's own identity should be maintained.

To begin the activity, the director asks the players to set the scene. The physical dimensions of the room or setting should be defined, with the locations of such features as doors and windows at least agreed upon, if not indicated by chalk marks or other means. A few simple props such as tables, chairs, a desk, or a rug help simulate reality.

To "warm up" the players, the director may walk around the set with each player individually and discuss aloud what his or her role will be, what kind of person will be portrayed, and how the character will react in the situation. This technique breaks the ice and gets people accustomed to their roles.

The role play director also may wish to point out that:

- The players should try to "get inside" their roles and respond as the real characters would. If the roles are played "just for laughs," then the activity will not be a valuable learning experience.
- If anyone is especially uncomfortable with a role, he or she should be free to change.
- Because of the freedom allowed in the role play activities, there is a possibility that conflicts may occur and people's emotions may become involved unless players take care to separate their own identities from the role being played.

During the enactment, the director is responsible for keeping the action within the scope of the planned activity and for reminding the participants to play their roles rather than representing their own points of view. The intrusions of the director into the action should be limited and should not slow the momentum of the activity. If personal conflict between players develops, the director must stop it immediately with a tactful reminder about the objective of the activity.

It often contributes to the learning experience if the director stops the action at the critical junctures during the enactment. He or she can call for an "instant replay" or ask participants to "freeze" and tell what they are feeling. The discussion should focus on what is taking place within the group at that point. Each role play exercise should be followed by a discussion period involving players and observers. The points raised should relate the event to the learning objectives, and the discussion should not get into issues such as the acting ability of the players. The characters may begin the discussion by explaining their reactions, how they felt as the characters, and why they acted as they did. Observers can address the same issues from their perspectives. Other points to be considered are what alternate ways the characters might have responded and what learning experiences resulted from the activity.

Written Exercises

Exercises calling for written responses of various kinds are used in some of the sessions to stimulate the participants to formulate conclusions individually. Materials handed out to supplement or follow up group discussion include multiple-choice, matching, and completion exercises, which are included because some individuals seem to learn better by writing than by listening, talking, or reading. The written exercises should not be "assignments" to be completed for their own sake. Rather, regard them as springboards for relevant discussions. Do not let the participants become bogged down in the details of the exercise to the extent that they waste time or lose interest.

Small Group Work

The plans for some sessions suggest that the participants break up into small groups to work on specific problems and report back to the large group. Forming these "buzz groups" can be handled either by having the participants make their own groups or by assigning members to groups. It is useful, however, to have a variety of background experiences represented in the composition of each group.

Some trainers feel that allowing groups to remain stable throughout the workshop or training program allows each group to develop as a working unit; others feel that it is better to encourage more diverse interactions by forming new groups for each session. If strong divisiveness seems to be developing in a group or if the trainer feels that a particular group is becoming a separate unit in a way destructive to the total group, he or she will probably want to reconstruct the groups for the following session.

Each group needs a recorder if there is to be a report to the larger group. The trainer may either assign recorders when each group is formed or allow each group to choose its own. It is a good idea in either case to have different individuals act as recorders in different sessions.

During small group activities, the facilitator circulates among groups to answer any questions, make sure that all the participants understand the activity, and ensure that the groups are on course in their discussions.

End the sessions early enough to allow sufficient time for followup discussions involving the whole group.

- Begin the followup with the reports of the conclusions reached by each team.
- Follow each report by brief discussion and question period, but reserve the major portion of discussion time so that all the conclusions can be treated together in context

Using Audiovisual Equipment

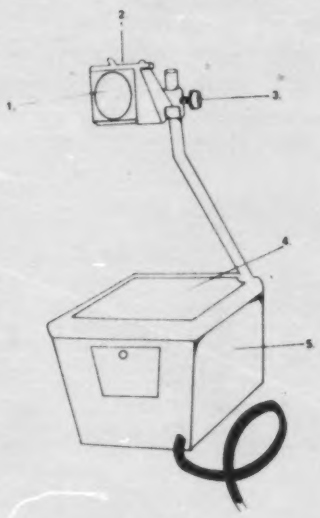
The expert use of transparencies, filmstrips, and other audiovisual media contributes immeasurably to any training event. Attention is focused on key issues, major principles are highlighted, and difficult concepts are expertly presented. Careful integration of audiovisual materials with the content will quicken the pace of the presentation and enliven the training event. On the other hand, audiovisual materials can seriously disrupt a presentation if the trainer is inept in the use of the equipment. Fumbling with transparencies that are out of sequence, searching for an extension cord, fiddling with the projector, or having a filmstrip out of synchronization with the soundtrack are problems that inevitably will plague the ill-prepared trainer. As a result, the pace of the session lags and the group's interest wanes.

The equipment is basically simple to operate. With careful setup and a brief practice period before the start of a session, it will function smoothly and fit into the presentation without a break in the continuity. The following sections explain the operation of the audiovisual equipment needed for presentation of these training materials and give tips on effective use.

The Overhead Projector

The overhead projector (figure 1) enlarges images printed on transparent acetate sheets and projects them

Figure 1. Overhead Projector

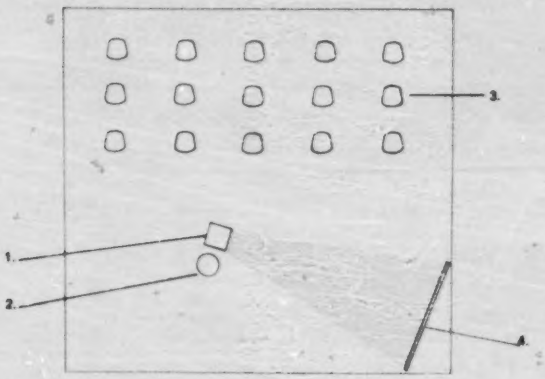


1. Lens
2. Mirror for picture tilt adjustment
3. Focus knob
4. Stage
5. Lamp casing

on a screen. It is used with the trainer facing the group so that eye contact with the participants can be maintained. The room does not have to be darkened to use an overhead projector, so the logistics are simplified.

To operate, set up the projector and screen as illustrated in figure 2.

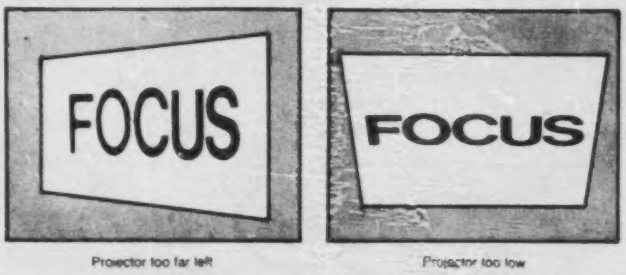
Figure 2. Proper Placement of Overhead Projector



1. Projector
2. Trainer
3. Participants
4. Screen

Place a transparency on the stage so that you can read it as you face the group. Turn on the light, and focus by turning the knob. Tilting the head of the machine with the tilt knob raises or lowers the beam of light. The distance from the screen determines the size of the image area. Adjust it until the light fills the screen evenly and no dark edges are showing. If the image is distorted by the "keystone effect" (see figure 3) correct by changing the position of the projector.

Figure 3. Keystone Effect



The overhead projector should only be left on when you want attention directed to the screen. Switching the projector off between visuals offers an opportunity to pinpoint attention on the screen each time a new visual is shown. When left on, it is a distraction that interferes with the presentation and group interaction. The overhead projector can be used as a chalkboard by placing a clear sheet of acetate on the glass and writing on it with a water-soluble, felt-tip pen or grease pencil. The acetate can be reused; just wipe off the pen or pencil marks.

When operating the overhead projector remember these precautions:

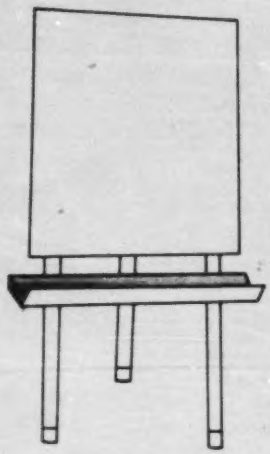
- Turn the lamp to "off" when changing transparencies.
- Always allow fan to run after turning off lamp to prevent heat buildup in the projector housing.
- Never move the projector when the lamp is hot. Hot filaments break easily.
- Always turn the lamp off and unplug projector when changing lamps. Both lamp and surrounding metal will be hot.
- Never handle a new lamp directly; use a piece of paper or handkerchief.
- Keep the projection stage clean.
- Clean lens as necessary.

Transparencies for use on the overhead projector can be made by a number of different methods, which range from simply writing information on a clear acetate sheet to using expensive multicolor heat or chemical transfer processes. The common types of photocopying equipment available in most offices easily convert printed materials, line drawings, or premade transparency masters such as those included in this package into transparency form. Acetate sheets are inserted in these machines according to manufacturer's directions and the master is reproduced in black and white on these sheets. The transparencies can be used unmounted or else framed in a cardboard holder (ordered from the local art or office supply stores) for ease of handling and storage. If an arrangement can be made with the audiovisual center in a local school, the diazo or heat process can be used to add color to the visuals. If such an arrangement can be made, the center staff will advise about which process is most effective and assist in use of the equipment. Having transparencies commercially reproduced is often prohibitively expensive, and, therefore, is not recommended.

Flipcharts

If an overhead projector is not available, transparency masters can be copied by hand on jumbo-size paper tablets and mounted on a tripod or other support. (See figure 4.) Flipchart paper and tripods may be purchased at art stores, office supply stores, or university bookstores. The local school may also be able to provide or tell you where to obtain such equipment.

Figure 4. Flipchart and Tripod



The Filmstrip Projector

The filmstrips included with this package are designed for use on a cassette model sound filmstrip projector (figure 5), which automatically advances the filmstrip on an inaudible electronic cue. If this type of projector is not available, any other type with a manual advance mechanism will work. In this case, however, it will be necessary to get a cassette tape recorder to play the soundtrack and to follow the script to pick up advance cues.

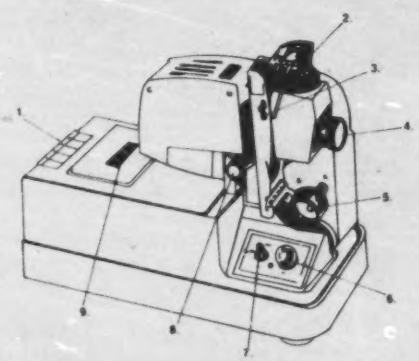
Equipment with a self-contained projection screen is not suitable for these training sessions because the screens generally are not large enough for the whole group to see.

Many different types of filmstrip projectors are available from a variety of manufacturers, each with unique operating instructions, but a few general principles apply to all machines.

To operate a filmstrip projector:

- Remove covers from the projector and set it on a firm stand.
- Insert the film according to directions provided by the manufacturer. To insert properly, face the screen, hold the strip so that you can read the title, then turn the filmstrip head down and push into the loading slot.
- Turn on the lamp, moving the projector toward or away from the screen as necessary to fill the required image area.
- Focus the picture by turning the lens barrel.
- If the image is split between two frames or only a portion of a frame is showing, adjust the image with the framing control mechanism, which will move the film up or down until it is properly alined within the image area.
- For cassette machines, simply start the projector according to manufacturer's directions. For manual machines, turn on the cassette recorder and advance the frames of the filmstrip as indicated on the script. Take care to keep the soundtrack and the filmstrip synchronized.
- After use, a filmstrip will be in a loose coil too large to put back into the container. Roll it carefully into a small coil. Do not grasp the roll in one hand and pull the loose end to reduce the size of the roll; this damages the film.
- Keep fingers off the frames of the filmstrip. Use the edges or the blank leader to handle the film.
- When projecting filmstrips, it is not always necessary to fill the entire screen. A smaller, brighter picture results if the image area is restricted.
- If the projector has a separate switch for the fan and lamp, always turn on the fan before the lamp, and let the fan run until the bulb has cooled.

Figure 5. Cassette-type Sound Filmstrip Projector



1. Tape control levers (stop, reverse, etc.)
2. Film feed guide
3. Film advance guide
4. Lens and focus
5. Film take-up
6. Volume
7. On-off switch
8. Frame adjustment control
9. Cassette tape player

Managing a Training Event: Planning and Logistics

The eventual success or failure of a training event can be decided months before the workshop, when initial planning begins. Even with well-designed materials, careful content preparation on the part of the trainer, and enthusiastic participants, a productive workshop cannot be guaranteed if the logistical details receive inadequate attention.

The tasks required to plan a training event can be grouped into three phases. The first steps take place when an agency decides to sponsor the program. The second phase includes preliminary details, ranging from making arrangements for facilities and inviting participants to preparation of the training site. The third involves details carried out during the training event. The following sections, which may be viewed as a "management checklist," discuss these phases chronologically. Careful attention to the tasks delineated in each will help ensure a meaningful and productive training event.

On Your Mark—Initial Phase

Decide to Sponsor the Event

No agency should sponsor a training program without determining whether enough people are interested in attending. To gage the probable response, either make informal telephone inquiries of likely participants or send letters to key organizations and people. If the reaction is good and it appears that a sufficient number of people are interested, planning can proceed.

Assign the Trainer

At this point, the sponsoring agency should designate a qualified trainer or trainers. If possible, another individual should be designated coordinator and made responsible for the many management and logistical details, enabling the trainer to concentrate on the training content. In practice, however, the trainer frequently must be the "coordinator" as well.

In choosing a trainer, look for someone with training skills and knowledge of the content area. This combination of knowledge and ability to conduct a training event is rare. If no single, qualified individual is available, there are other options:

- Use a training team composed of several people with different kinds of skills and knowledge of special topics related to the training content.
- Use one trainer assisted by one or more consultants who can serve as a "resource" for content requiring specialized expertise.

The trainer's role is usually demanding and exhausting, so use of more than one person is often desirable, especially if the event lasts more than 1 day or the content is highly technical.

Set a Time Schedule

Next, it is extremely important to schedule the various management tasks and activities. This process can be facilitated simply by listing the actions called for in this checklist and setting a target date for each. This step will preclude such mishaps as beginning a session without the needed materials or equipment.

Prepare a Preliminary Budget

The training package itself is provided free of charge, but the other expenses involved in conducting the workshop may include

- the time of the trainer and possibly the time of one or more assistants before, during, and after the workshop;
- lunch and other refreshments served during the workshop;
- reproduction of handouts, transparencies, and evaluation forms;
- pens or pencils, paper, name tags;
- flipchart and paper, markers;
- rental of the meeting place (if not provided by the sponsoring agency);
- rental of audiovisual equipment (if not available on loan).

Unless the sponsoring agency requires other procedures, all expenses should be included in a preliminary estimate of costs. If a fee is to be charged to the participants, it can be based on this preliminary budget. Once participants have been selected, a final, revised budget can be computed. Unless already established by the sponsoring organization, procedures must be developed for purchasing supplies and for renting space and equipment if necessary.

Get Set—Intermediate Stages of Planning

Select Date and Site for the Training Event

Several factors have to be considered when setting the date for a training event and choosing the meeting room. The day of the week can influence many potential participants' willingness to attend. For example, a Friday may be a bad day to end a workshop because of heavy airport, railway, and highway traffic. In addition, there may be special local celebrations or religious observances that affect a few people who might otherwise attend a training event. If several key organizations are involved, it might be wise to determine what regularly scheduled meetings or events might keep their staff members away.

The site for the meeting should be convenient to most participants and near transportation, entertainment facilities, and food service. Trainers often neglect to check out the actual room in which the sessions will be held before formalizing the arrangements for facilities. As a result, many meetings end up in stuffy, subterranean rooms or in cramped motel suites. Sometimes participants are plagued by extremely uncomfortable chairs and end up sitting on the floor. A poor heating system or arctic settings for the air-conditioning can disrupt sessions. Banging radiators or noise from a nearby kitchen may also distract attendees and trainers. To avoid problems it always pays to *inspect the physical setting* in person before making any commitment.

Check on these details:

- Does the room have windows?
- Can it be darkened for audiovisual projection?
- Are there pillars in the room that will obstruct someone's view?
- Is there adequate space for small group work?
- Are there enough electrical outlets?
- Is the room noisy?
- Is the furniture adaptable to program needs?

Make Arrangements for Lodging

If it is likely that some participants will come from out of town, make arrangements with a nearby hotel or motel so that there will be enough rooms available for attendees who need lodging. Logistics will be simplified if all participants stay at one location, but if necessary, two nearby facilities can be selected. If the meeting room has to be rented from a hotel or motel, it obviously makes sense to arrange lodging in the same place. Sometimes, the meeting rooms are made available without charge if participants stay at the hotel or motel.

Get a written commitment for the required number of rooms and ask that the price be specified in writing. Many managers will give a reduced rate for groups. Also, check to find out the deadline for making reservations so that you can include it in the information you send to participants, and confirm whether prepayments or other arrangements must be made to hold the rooms.

Recruit the Right People

No training event can be successful unless the participants are types of trainee for whom the materials were designed. Groups frequently include some members for whom the training is "old hat," others for whom the

content is peripheral to their real needs, and some for whom the content is too technical. To recruit the type of participant you want, make clear in the information sent to prospective attendees

- for whom the program is designed;
- what trainees will learn;
- who can benefit from the training;
- who is sponsoring the event;
- the time and place;
- the cost (if any); and
- instructions for registration

A sample invitation letter designed for use with this package is included on pages 61 and 62. You can easily modify it to meet the needs of your agency. Experience indicates that to obtain the recommended group size of approximately 12 to 20 people, 75 to 100 letters of invitation should be sent. The letter of invitation should include an application form.

Select and Notify Participants

The response to the letter of invitation may give several options for selection of the trainees. If many people reply, you may simply accept qualified applicants in the order they apply until the suggested group size is obtained, or you may try to construct a group with varying backgrounds and experience. In other cases, fewer participants than expected may respond. Even in this instance it is wise to weed out any applicants whose interests or backgrounds clearly exclude them from the target group.

All who apply should receive a letter either confirming acceptance or explaining tactfully why they will not be able to participate. (See samples on page 63.) If some attendees will be coming from out of town, it is helpful to enclose travel and lodging information as well as maps of the local area. Some trainers like to call participants before the start of a workshop to establish rapport and set a friendly tone.

Prepare a Roster of Workshop Participants

After trainees are selected, a roster should be prepared listing names, addresses, and, if appropriate, the organizations they represent. If time permits, copies can be sent to participants, who often appreciate knowing who else will be attending. Inevitably, you will have to make changes in the list before the actual start of the workshop, so plan to have a revised version ready to pass out at the first session.

Plan and Arrange Food Service

After determining how many people will be attending the session, the arrangements must be made for any food or refreshments to be served during the sessions. Motels, hotels, and other commercial organizations usually insist that refreshments be ordered through them. You usually can't bring your own coffee, tea, or soft drinks. It is up to those sponsoring the event to be sure that these arrangements are made. If an organization is providing the room rent-free, it may be possible to bring in a coffee or tea pot.

If dinners or luncheons are scheduled as part of the activities, they obviously require advance preparation. The number of attendees, the menu, and the cost must be specified well in advance. Deposits or prepayment are often required.

Prepare a Final Budget

At this point, it is possible to compute a final budget using the actual number of attendees to determine the required expenditures. The revision should include all needed supplies, refreshments, equipment, room rent and other items. Obtain approval as required by the sponsoring organization and confirm the procedures for making disbursements.

Acquire the Audiovisual Equipment

If the sponsoring organization does not already have the necessary audiovisual equipment, it can usually be borrowed. The public school system, the audiovisual department of a local college or university, and community agencies are good sources. If not available on loan, the equipment can be rented. Check the Yellow Pages under "Audiovisual Equipment and Supplies" for the names of vendors.

Obtain and/or Prepare Instructional Materials

Arrangements to obtain any films or filmstrips to be used in a training event should be made several weeks in advance, and trainee texts should be ordered for the expected number of participants. Overhead transparencies should be made from masters and the participant handouts reproduced. Related equipment, such as a flipchart or chalkboard, must also be obtained.

Prepare the Meeting Room

The day before the start of a workshop, doublecheck the meeting room to make sure the heating or air-conditioning is working properly, and set the room up as required for the first session. At the same time, confirm the arrangements for refreshments and food service. Deliver the audiovisual equipment, set it up, test it, and, if possible, go through a dry run of the presentation.

Collect Supplies and Place in Meeting Room

Place all necessary supplies in the room. Don't forget:

- Pencils
- Paper
- Name tags
- Registration forms
- Wastepaper baskets
- Tape, chalk, felt-tip pens
- Extra bulbs for audiovisual equipment
- Extension cords
- Receipt book (if participants have to pay a fee)
- Cups
- Spoons
- Sugar and cream
- Ashtrays
- Evaluation forms

Assemble all instructional materials, arranged in the order they are to be used. Make sure they are in a convenient location for use by the trainer during the sessions.

Go—The Workshop Itself

Set Up a Registration Desk

Shortly before participants arrive, set up a desk where attendees can register. It also may be helpful to put up some signs directing people to the room. Training manuals, participant rosters, and name tags can be passed out as the trainees fill out registration forms. Most trainers find that it is vital to have support staff assist with the registration so that the trainers are free to greet the participants and start the first session. Usually there are late arrivals who will have to be accommodated after the start of a session.

Conduct the Training

The trainer, while responsible for conducting the workshop, still must carry out management tasks during the sessions. Refills of the coffee or tea pot, problems with late arrivals, and similar annoyances have to be taken care of. Support staff can help with these problems, but it is likely that the trainer will be involved.

Prepare for the Next Session

After the conclusion of one session, the trainer immediately has to anticipate the next. Get participants to help change the seating arrangements if necessary. Collect and store transparencies, filmstrips, and other instructional materials used during the session. Locate and arrange materials needed for the next presentation. Pass out any handouts required for the upcoming session. If more than one trainer is participating, they should debrief each other at the close of each session to avoid duplication and ensure integration of concepts and content.

Many trainers use the time between sessions, as well as lunch and coffeebreaks, to mix with participants and gage their responses. By doing so, they identify potential dissatisfaction before it disrupts the sessions and get useful feedback regarding how well the trainees' needs are being met.

Wrap It Up—After the Event

See Participants Off

At the end of the training event, be prepared to help attendees with travel arrangements. Some may need transportation to the airport or the railway station; those driving may want directions on how to get out of town. It helps to have a map, the telephone number of the closest taxicab company, and an airport limousine schedule at hand.

Arrange for Cleanup and Return of Equipment

Unless specific custodial agreements have been made with the management in the building where the workshop was held, you probably will have to initiate a cleanup project. Often participants are willing to help, and all staff members should be expected to pitch in, collecting trash, emptying ashtrays, straightening out chairs, and putting away supplies. The trainer also should be sure that the audiovisual equipment is returned to the owner and that the extra supplies and instructional materials are not left in the meeting room.

Pay Outstanding Bills and Write a Management Report

After completion of the sessions, make sure that all bills have been paid. Then, prepare a report that contains an accounting of the funds received and the cash outlayed. The report should also evaluate the workshop from the management viewpoint and include suggestions for any future training events.

Sample Invitation Letter to Participants

Dear _____:

I am writing to announce a 1-day training workshop, "Using Volunteers in Your Agency; Planning, Implementing, and Maintaining Volunteer Programs in Alcohol Service Agencies," to be presented by _____(your agency)_____.

The workshop will be conducted at _____(location)_____ on _____(date)_____.

"Using Volunteers in Your Agency" was developed by the Area Alcohol Education and Training Program and the National Center for Alcohol Education under the auspices of the National Institute on Alcohol Abuse and Alcoholism.

The workshop is designed for those responsible for planning, implementing, and maintaining a volunteer program in an alcohol service agency. The training sessions address the following topics:

- pros and cons of volunteer programs,
- principles of effective volunteer program planning and management,
- planning phases and steps in volunteer program design,
- assessment and analysis of the agency's readiness to develop or improve a volunteer program, and
- action plans for initiating or improving a volunteer program.

The focus of the workshop is on a volunteer program that recruits, trains, and assigns individuals as nonpaid workers to provide service as an integral part of the agency staff. Participation in the workshop should benefit both those who are just starting to plan a volunteer program and those who want to improve an existing program.

As an integral part of the workshop, each participant will receive a copy of the *Volunteer Program Development Guide* for use during the workshop and for reference when managing a volunteer program in his or her sponsoring agency. The guide presents the principles of effective volunteer program planning and a step-by-step procedure to follow in exploring the feasibility of a volunteer program and in designing and implementing a program in a particular agency. It also contains sample forms, resource lists, and suggestions for staff orientation and volunteer recruitment, selection, and training.

(Agency-specific information, including cost to participants, is inserted here.)

If you wish to attend this workshop, please complete the application form and return it by _____(date)_____. Attendance will be limited to 20 participants and applications will be accepted in the order received. Your application will be promptly acknowledged. Thank you for your interest and cooperation.

Sincerely,

_____

Application

_____ Yes, I would like to participate in the workshop "Using Volunteers in Your Agency" to be held ___(date)___.

_____ No, I cannot attend this workshop but would like to be notified should you run the workshop again in the future.

My name is _____

The name and address of my agency is _____

_____

Telephone number _____

My position is _____

_____ I am interested in initiating a volunteer program in my agency.

_____ I want to improve specific aspects of my agency's existing volunteer program.

Sample Participant Selection Letter

Dear _____:

I am pleased to tell you that you have been selected to participate in the 1-day workshop "Using Volunteers in Your Agency."

The workshop will be held on _____(date)_____ from _____(time)_____

to _____(time)_____ at _____(location)_____.

Enclosed you will find your registration form and a participant profile form. Please fill these out and return them with

your registration fee of $ _____(amount)_____ by _____(date)_____.

If you have any questions, please call me at _____(phone)_____ or write to the above address.

I look forward to meeting you on _____(date of workshop)_____.

Sincerely,

_____

Sample Rejection Letter

Dear _____:

Thank you for applying to the "Using Volunteers in Your Agency" training workshop being offered by

_____(sponsoring agency)_____. When your application arrived, all available places had been filled. We appreciate your interest in the training program and will notify you of possible future runs.

Sincerely,

_____

Participant Handout Masters

Participant Introduction Guide

As a means of getting to know each other, each participant will be asked in turn to introduce himself or herself. Please use the following questions as a starting point and feel free to add any further comments or anything else you would like the group to know about you.

1. What is your name? How do you prefer to be addressed?
2. Where do you live?
3. What agency do you represent? What do you do there?
4. What are some of your interests outside of work?
5. What is your experience with volunteer programs as a director or coordinator, as an observer, as a volunteer yourself?
6. What brought you to the workshop? What are your expectations or objectives regarding the workshop?

HANDOUT 2

Workshop Goal and Objectives

Goal: On completion of the training workshop, participants will have a greater awareness of the issues relating to volunteer programs and an understanding of the elements of an effective volunteer program as described in the guidelines, documents, and resources presented in the training.

At the end of session 1, participants should be acquainted with the trainer(s) and the other participants and should be able to:

- describe the training goal of the workshop and relate this goal and the learning objectives to the overall sequence of workshop activities,
- describe problem areas related to starting or managing a volunteer program in their own agencies,
- list at least three advantages of using volunteers in an alcohol service agency program, and
- list three reasons not to use volunteers in an agency program, together with counterarguments in favor of using volunteers.

At the end of session 2, participants should be able to:

- list the eight principles of an effective volunteer program as discussed in the filmstrip "eight" and the *Volunteer Program Development Guide (VPDG)*, and
- describe at least two potential problems that would be avoided by observing each principle.

At the end of session 3, participants should be able to:

- list the three phases of the volunteer program planning procedure presented in the filmstrip "steps" and the VPDG.
- relate a given principle of effective volunteer program development to how the principle is put into practice in at least one phase of pilot program planning, and
- describe the relevance of one planning step to their own agency situation.

At the end of session 4, participants should have:

- analyzed the current status of their agencies regarding a volunteer program, using an agency assessment checklist and the VPDG, and
- based on this analysis, have identified the first task they want to undertake on return to their own agencies and developed a plan to accomplish this task.

Agency Assessment Checklist

I. Agency Assessment

This form is designed to help you focus your thinking about the agency you represent and the volunteer program operating in that agency or on your agency's readiness to begin development of a volunteer program. The questions parallel the ingredients of an effective volunteer program as discussed in the *Volunteer Program Development Guide.*

Try to answer each question based on your knowledge of your own agency and its staff. Some of the questions will not be applicable if your agency does not yet have a volunteer program, but read them over for consideration in planning a program. You will complete and discuss this form later in the workshop and can retain it as a reference as you begin to develop or improve a volunteer program in your agency.

Agency Goals	Yes	No	So-So	Don't Know
1. Are the goals or purposes of the agency clearly stated?	_____	_____	_____	_____
2. Are they communicated to and understood by all staff members?	_____	_____	_____	_____
3. Are the goals of the volunteer program consistent with agency goals? or would a volunteer program be consistent with agency goals?	_____	_____	_____	_____
Agency Commitment				
4. Is there sufficient interest among				
board members	_____	_____	_____	_____
administration	_____	_____	_____	_____
staff	_____	_____	_____	_____
in exploring the feasibility of a volunteer program?				
5. Would clients be receptive to volunteer staff?	_____	_____	_____	_____

HANDOUT 3

Agency Assessment Checklist – page 2

	Yes	No	So-So	Don't Know
Agency Commitment (cont'd)				
6. In agencies with volunteers, is there a regular, carefully prepared budget for the volunteer program?	_____	_____	_____	_____
7. Is there a staff position of volunteer coordinator?	_____	_____	_____	_____
8. Does the volunteer coordinator feel that he or she has time to do the job adequately?	_____	_____	_____	_____
9. Does the volunteer coordinator report to the agency director?	_____	_____	_____	_____
10. Does the volunteer coordinator receive the support and cooperation of other staff members?	_____	_____	_____	_____
Planning				
11. Does the agency usually spend a sufficient amount of time in collecting information and planning before embarking on a new program?	_____	_____	_____	_____
12. Are representatives of all involved groups included or consulted in the planning of a new program?	_____	_____	_____	_____
In an agency with a volunteer program:				
13. Was adequate time spent in planning the volunteer program, including consultation with all the people affected?	_____	_____	_____	_____
14. Were specific procedures developed for				
recruiting and selecting volunteers?	_____	_____	_____	_____
orientation and training of volunteers?	_____	_____	_____	_____
volunteer supervision?	_____	_____	_____	_____
staff orientation?	_____	_____	_____	_____
program evaluation?	_____	_____	_____	_____

Agency Assessment Checklist – page 3

	Yes	No	So-So	Don't Know
Personnel Policies				
15. Does the agency have clear policies and procedures regarding hiring, assignment, supervision, evaluation, and advancement of personnel, including volunteer staff, if any?	_____	_____	_____	_____
16. Are there written job descriptions for all staff, including volunteers?	_____	_____	_____	_____
In agencies with a volunteer program:				
17. Are applications used and evaluated before volunteers are accepted?	_____	_____	_____	_____
18. Is each volunteer interviewed at least once?	_____	_____	_____	_____
19. Do volunteers sign or explicitly consent to a contract specifying a number of hours of work per week for a definite period?	_____	_____	_____	_____
	_____	_____	_____	_____
Orientation and Training				
20. Is inservice training provided to staff on a regular basis?	_____	_____	_____	_____
In agencies with a volunteer program:				
21. Are several hours of orientation and training required of each volunteer before assignment?	_____	_____	_____	_____
22. Is regular attendance at inservice training meetings a part of the volunteer contract?	_____	_____	_____	_____
23. Is there a systematic effort to orient paid staff to the volunteer program?	_____	_____	_____	_____
Recognition				
24. Is adequate attention paid to recognition of staff in the agency?	_____	_____	_____	_____
25. Does each volunteer have an I. D. card or some other suitable identification?	_____	_____	_____	_____

HANDOUT 3

Agency Assessment Checklist -- page 4

	Yes	No	So-So	Don't Know
Recognition (cont'd)				
In agencies with volunteer programs:				
26. Is there a desk or some space permanently designated for volunteer use?	_____	_____	_____	_____
27. Is provision made for experienced volunteers to move up in responsibility and status (e.g., volunteer leader, service on volunteer advisory board)?	_____	_____	_____	_____
28. Are volunteers given references for use in seeking paid employment?	_____	_____	_____	_____
29. Can qualified volunteers, who wish to, get college credit for their service?	_____	_____	_____	_____
30. Are paid staff also recognized for their contributions to the volunteer program?	_____	_____	_____	_____
Evaluation				
31. Does the agency take stock periodically of how it is doing?	_____	_____	_____	_____
32. Does it act on the information gained to modify programs when necessary?	_____	_____	_____	_____
33. Are				
paid staff	_____	_____	_____	_____
volunteers	_____	_____	_____	_____
clients	_____	_____	_____	_____
asked what they think of the program at least twice a year?				
34. Are formal records and accounts kept on the volunteer program?	_____	_____	_____	_____
35. Is there attention to whether and why volunteers leave the program before the end of their time commitment?	_____	_____	_____	_____

	Yes	No	So-So	Don't Know
Community Resources				
36. Does the community at-large generally support the agency and its program?	_____	_____	_____	_____
37. Are there people or organizations in the community who could contribute materials or services that would complement a volunteer program (e.g., printing of a newsletter, background training on alcoholism for volunteers, equipment for a volunteer-staffed recreation program, etc.)?	_____	_____	_____	_____
38. Are there other agencies with volunteer programs in your community that would share their experience with you?	_____	_____	_____	_____

Analysis

If the majority of your check marks appear in the "don't know" column, your first task might be to do this assessment again on return to your agency, with the aid of agency staff.

If the majority of the check marks appear on the "no" and "so-so" columns, you may want to consider recommending a reexamination of the idea of a volunteer program or of the program now existing in your agency by those most involved.

If the "no" and "so-so" check marks cluster in one or two areas, you have pinpointed some areas you will want to look at more closely.

II. Planning Guidelines

Based on your responses to the questions in part I and your analysis of these responses, begin to think about your first steps on return to your agency and develop some preliminary plans to help you take those steps. Refer to appropriate sections of the *Volunteer Program Development Guide* as needed for ideas.

1. What seems to be the major problem area (or areas) in regard to the development of a volunteer program or the functioning of an existing program in your agency (i.e., agency goals, commitment, planning, personnel policies, orientation and training, recognition, evaluation)?

HANDOUT 3

Agency Assessment Checklist – page 6

2. Select one problem area (see #1 above) and describe as precisely as possible what you think the particular problem is in that area.

3. Do you need more information? If so, what? Who has the answers?

4. What outcome(s) must be achieved in order to solve this problem?

5. What are some alternative ways to go about it? Who can help?

Agency Assessment Checklist – page 7

6. Which alternative seems to make most sense at this time?

7. What must be done to put it into action?

Principles of Effective Volunteer Program Development

Across the Board: The agency must be fully committed to the idea of volunteer program.

Don't Face It Alone: More than one person's time and ideas are needed to plan and implement a volunteer program.

Start Small: The initial volunteer program should be a pilot program.

Walk, Don't Run: Sufficient time should be allotted for planning before the first volunteer is recruited.

It's Not a Fifth Wheel: The volunteer program must be an integral part of the total agency program.

They're on the Team: The volunteer must be an integral part of the total agency staff.

It's a Two-Way Street: Volunteer incentives are critical to program success.

Take Time to Take Stock: Monitoring and evaluation of the volunteer program is an ongoing necessity.

These principles are discussed in section I of the *Volunteer Program Development Guide*, pp. 1-7.

Overhead Transparency Masters

WORKSHOP OVERVIEW

SESSION 1

PROS AND CONS OF A VOLUNTEER PROGRAM

SESSION ACTIVITIES:

- **AGENCY ASSESSMENT**
- **BRAINSTORMING PROS AND CONS OF USING VOLUNTEERS**
- **DEVELOPING COUNTER ARGUMENTS TO CONS**

SESSION 2

PRINCIPLES OF AN EFFECTIVE VOLUNTEER PROGRAM

SESSION ACTIVITIES:

- **FILMSTRIP "EIGHT"**
- **RELATING PRINCIPLES TO PROBLEMS**

WORKSHOP OVERVIEW

SESSION 3

PLANNING A PILOT VOLUNTEER PROGRAM

SESSION ACTIVITIES:

- **FILMSTRIP "STEPS"**
- **WORKING THROUGH A PLANNING STEP**

SESSION 4

GETTING STARTED WITH YOUR OWN AGENCY PROGRAM

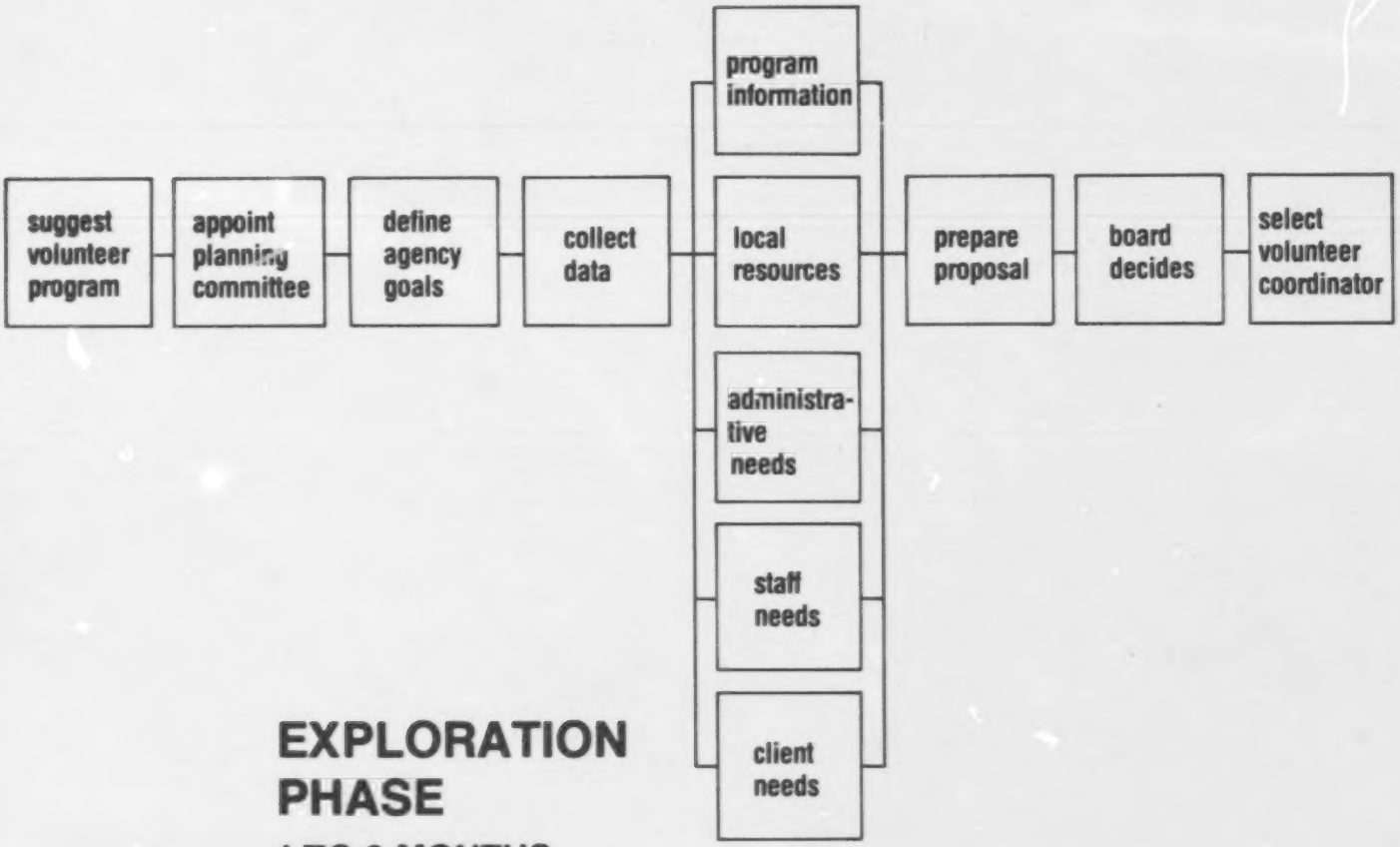
SESSION ACTIVITIES:

- **COMPLETION OF AGENCY ASSESSMENT**
- **DEVELOPING AN INITIAL PLAN OF ACTION**

SESSION 1: *INSTRUCTIONS FOR SMALL GROUP WORK*

1. GROUPS OF 4 OR 5 PARTICIPANTS ARE ESTABLISHED.
2. A RECORDER IS CHOSEN FOR EACH GROUP.
3. RECORDERS COPY THE "CONS" OR PROBLEMS ASSIGNED TO THEIR GROUPS.
4. GROUPS ASSEMBLE AND DEVELOP COUNTER ARGUMENTS FOR AS MANY OF THE ASSIGNED PROBLEMS AS POSSIBLE.
5. RECORDERS TAKE NOTES AND PREPARE TO MAKE A 3-5 MINUTE REPORT TO THE LARGE GROUP.

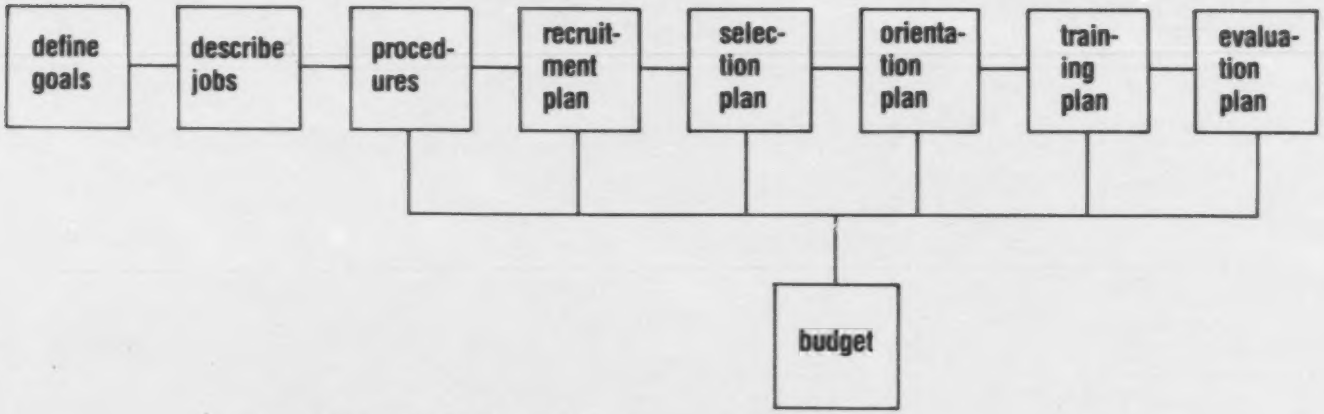
VOLUNTEER PROGRAM DEVELOPMENT STEPS:



EXPLORATION PHASE

1 TO 3 MONTHS

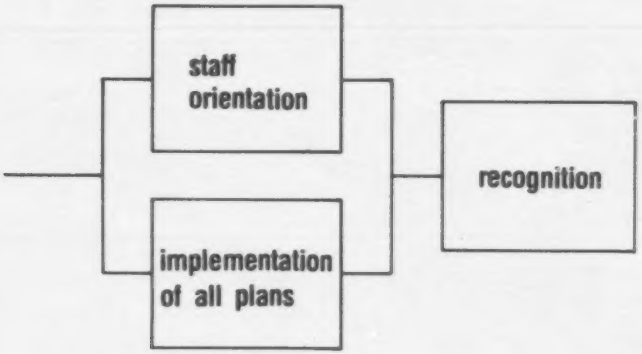
VOLUNTEER PROGRAM DEVELOPMENT STEPS:



PILOT PROGRAM DESIGN PHASE

1 TO 3 MONTHS

VOLUNTEER PROGRAM DEVELOPMENT STEPS:



IMPLEMENTATION PHASE

6 TO 9 MONTHS

SESSION 3: *INSTRUCTIONS FOR SMALL GROUP WORK*

1. GROUPS OF 4-5 PARTICIPANTS ARE ESTABLISHED.
2. EACH GROUP CHOOSES A STEP FROM THE PLANNING AND IMPLEMENTATION MODEL FOR DISCUSSION.
3. SMALL GROUPS CONVENE AND READ THE RELEVANT PAGES IN THE VPDG.
4. GROUPS PREPARE A PRESENTATION FOR THE LARGE GROUP.
5. LARGE GROUP RECONVENES; SMALL GROUPS MAKE PRESENTATIONS IN TURN.

SESSION 4: *INSTRUCTIONS FOR SMALL GROUP WORK*

1. GROUPS OF 5 OR 6 PARTICIPANTS ARE FORMED TO DISCUSS PROBLEM AREAS IN THEIR AGENCIES AND THEIR INITIAL PLANS.
2. A RECORDER IS CHOSEN FOR EACH GROUP.
3. EACH PARTICIPANT IN TURN PRESENTS HIS OR HER PROBLEM ANALYSIS AND APPROACH TO SOLUTION AND INVITES COMMENT AND SUGGESTIONS FROM THE GROUP.
4. RECORDER TAKES NOTES IN ORDER TO PRESENT SUMMARY TO LARGE GROUP.

Training Evaluation: Participant Feedback Instrument

Introduction

Most trainers, while interested in evaluating workshops or training events they conduct, are not interested in carrying out elaborate tests, and unless they are engaged in a research project, sophisticated statistical procedures for analyzing participant feedback are not required. The participant feedback evaluation instrument and the following guidelines for its use are designed to provide the trainer with an easy-to-use method for assessing the effectiveness of the training event he or she has just conducted.

Anonymity of Participants

Since the purpose of the feedback is to provide the trainer with information about the training event rather than information about the performance of individual participants, there is no need for the participants to put their names on the feedback forms. By guaranteeing the anonymity of the participants' responses, the trainer increases the chances of receiving honest feedback, responses which most accurately reflect the reality of the training event.

Administering the Feedback Form

If the feedback form is to be used, this should be stated at the beginning of the program rather than at the last minute. Participants should be given a brief explanation about the purpose of the forms before they are distributed. The instructions are self-explanatory.

Coding the Forms

To code the data into a usable form, the trainer needs simply to tally the responses from the individual forms into a table such as below.

Interpreting the Data

What is the central tendency or central position of the participants as a group as reflected by the rating scale? The quickest measure of the group's central tendency is the mode, that is, the rating that occurred most frequently. As one can see in the table above, the mode or the rating most frequently used by the participants was 4 (above average). While each trainer may determine what will constitute a successful workshop, one suggestion is that 50 percent or more of the responses should be above 3 on the rating scale. As one can see, 54 percent of the responses were above three. Using the above criterion this workshop would be called successful.

Number of Participant Responses as Distributed Across Rating Categories

Rating Categories	1 Excep. poor	2 Below average	3 Average	4 Above average	5 Excep. good
Clarity of objectives	1		3	5	1
Organization of workshop		1	2	4	3
Appropriateness of content		2	4	3	1
Clarity of presentation			5	4	1
Effectiveness of teaching aids		1	4	3	2
TOTAL	1	4	18	19	8
Number and % of responses		23 (46%)		27 (54%)	

Using Volunteers in Your Agency, a Workshop

Participant feedback form

Please indicate your assessment of this workshop by circling one number under each of the categories listed below.

Clarity of Objectives: The objectives of this workshop were understandable as presented and became evident as the program unfolded.

Exceptionally Poor	Below Average	Average	Above Average	Exceptionally Good
1	2	3	4	5

Organization of Workshop: The sequence and duration of the workshop were scheduled in a way which facilitated my learning.

Exceptionally Poor	Below Average	Average	Above Average	Exceptionally Good
1	2	3	4	5

Appropriateness of Content: The content and materials selected for the workshop were scheduled in a way which facilitated my learning.

Exceptionally Poor	Below Average	Average	Above Average	Exceptionally Good
1	2	3	4	5

Clarity of Presentation: The content of the workshop was presented in a way that was understandable.

Exceptionally Poor	Below Average	Average	Above Average	Exceptionally Good
1	2	3	.4	5

Effectiveness of Teaching Aids: The teaching aids (overhead transparencies, filmstrips, and handouts) facilitated my learning.

Exceptionally Poor	Below Average	Average	Above Average	Exceptionally Good
1	2	3	4	5

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